Gough Thomas & Scott Solicitors

Probate – Obtaining the Grant Only

This means that we assist you with the work necessary to get the legal authority from the Probate Court, to allow you to deal with the estate of someone who has died. You then deal with all other aspects of the estate administration yourselves. Generally this is only suitable for simple estates of low value.

<u>The basic work to obtain a Grant of Probate / Letters of Administration only would involve:</u>

- Taking your instructions and providing initial advice
- Dealing with client care matters including ID documents and checks
- Checking through and advising on the terms of the Will or advising on the rules of intestacy
- Getting information from you of the assets and liabilities in the estate
- Preparing any Inheritance Tax Return required and the Probate application based on the information you have provided
- Reviewing the forms with you, and arranging for them to be signed and sworn
- Submitting the application for the Grant and the inheritance tax return
- Dealing with any enquiries raised on those papers
- Receiving and checking through the Grant
- Providing you with the required office copies of the Grant
- Sorting and closing the file and sending any necessary documentation to you

Additional work & more complex matters can be dealt with and these are set out in the next section 'Whole Estate Administration'.

Warning: If you instruct us to obtain the Grant only then you, as the executor(s) will be personally responsible for complying with your obligations in relation to the estate and will remain personally liable if you fail to fulfil those obligations.

Timescales

These will vary depending on the estate and the assets involved. As a rough guide, a grant should be obtained within 2 – 3 months of instruction.

There are lots of things that can influence timescale in obtaining a Grant. We will give you regular updates throughout the course of the matter.

Costs

Our fees are estimated on a tailored and individual basis. There are a lot of things that can influence the costs involved.

We make an estimate based on the amount of time we anticipate spending on the application. Therefore, whilst the figures below are a general guide, it is important you rely on the estimate given to you at the outset.

- For an estate worth less than £325,000 our usual charge would be £1,000 plus VAT
- For an estate worth over £325,000 where no IHT is payable, our usual charges would be £1,200 plus VAT
- For an estate worth over £325,000 where we need to use form IHT400 and/or IHT is payable, our usual charges would be £1,500 - £2,000 plus VAT. Note that instructions to obtain a Grant only may not be suitable for estates such as this.

Expenses incurred

Probate Court fees are likely to be the only additional expense we incur when obtaining a Grant only. Other expenses would be payable by you from the estate. The basic fee is £300 if we apply for the Grant for you, and there is a charge of £16 for additional copies of the Grant. The number of copies required will depend on the assets of the estate