

What is Included in Our Full Estate Administration Service?

In providing a full estate administration service, Evans Harvey Solicitors will:

- Meet with the Personal Representatives and collate full details of the deceased and estate
- Contact all asset holders/creditors for assets/liabilities (and, where appropriate, property/investment valuations)
- Inform all legatees and beneficiaries and carrying identity/bankruptcy checks
- Insert statutory notices, as required
- Undertake a financial asset search as required
- Prepare documentation for HM Revenue & Customs (HMRC), calculate and pay Inheritance Tax (arranging for an advance or loan, if necessary)
- Payments from estate funds of any Inheritance Tax due
- Prepare the Legal Statement for signature by the Personal Representatives at a face-to-face meeting. Alternatively, the document may be sent in the post for signature following a discussion about the contents over the telephone.
- Submit tax forms
- Submit Probate Application and payment of the Court fee (currently £300.00 plus £1.50 per official copy Grant)
- Payment of all legacies and debts
- Attain all information to prepare and lodge Income Tax Return or repayment claim
- If appropriate, interim payments to beneficiaries
- Prepare final Estate Accounts for approval by the Personal Representatives and residuary beneficiaries
- Make payment to pecuniary legatees and residuary beneficiaries of their entitlement and provide tax certificates, where necessary

What is not Included in our Full Estate Administration Service?

In providing a full estate administration service, this does not include:

- Investigate claims by the Department of Work and Pensions (DWP)
- Deal with missing items
- Deal with missing beneficiaries
- Assist with Deeds of Variation
- Assist with disagreements or litigious issues arising from the estate
- Deal with assets which do not form part of the estate, such as life policies or trust assets
- Set up or disband any trusts arising as a result of the Will or intestacy
- Conveyancing in relation to the sale of a probate property (details of the process, cost and timescale for this can be found in our separate Conveyancing area of the website)

However, we can assist with such further matters subject to agreement as to costs (plus VAT at 20%) and disbursements upon an individual basis, if required.