



WILLS JACOBSEN L E G A L

PROBATE ASSIST CLIENT CARE SUPPLEMENT LETTER

We recognise that not all the estates of someone who has died need a full administration service provided by solicitors. However, where a person dies leaving assets of more than £5,000 it is generally necessary to obtain something called a Grant of Representation. This is a term that covers a Grant of Probate where someone has left a Will and a Grant of Letters of Administration where someone has died without leaving a Will.

We accept that it is possible for a non solicitor to administer a straightforward estate and that it is possible to apply for a Grant of Representation personally and not use a solicitor. However, if you apply in person you will have to go for an interview at the Probate Registry, complete an application form and complete an Inheritance Tax form known as IHT205. All of this is unavoidable.

We are able to offer you a scheme to assist you with the "legalities" but which allows you to fulfill all other administrative tasks thus reducing the cost of administering the estate.

ADVANTAGES OF THE PROBATE ASSIST SCHEME ARE AS FOLLOWS:-

1. **Convenience** - it will not be necessary for you to attend the Probate Registry in person
2. **Speed** - a Grant of Representation can be obtained through this process much quicker than attending an interview at the Probate Registry.
3. **Flexibility** - you undertake those tasks that you do not need a solicitor to assist you on.
4. **Cost effectiveness** - a fixed price reduced cost service to assist in the smooth administration of an estate
5. **Value for money** - for any executor or beneficiary connected with an estate being administered under this Scheme we will offer a 15% reduction against our standard fees for any instructions given to us for the preparation of Wills.

SUITABILITY OF THE PROBATE ASSIST SCHEME:-

In order to assist those persons who would otherwise wish to apply for a Grant of Representation in person we have created a process by which we can obtain the Grant of Probate / Letters of Administration for you for a fixed price following which you can administer the estate personally.

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The Old Secretary's Office, Lakeside Lodge, Fen Road, Pidley, Cambridgeshire PE28 3DF

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The Probate Assist Scheme is not for everyone and in your case you may need extra help. The Scheme is only suitable in the following circumstances:-

- 1 The gross value (that is the total value of a person's assets including any joint assets) is less than £325,000 or
- 2 The gross value is less than £1,000,000 and there is no Inheritance Tax to pay because the estate passes to a surviving spouse or a charity
- 3 The person who has died did not make gifts totalling more than £3,000 per annum in any of the seven years prior to their death
- 4 The person who has died did not give an asset away in his/her lifetime and still continued to benefit from it.
- 5 The person who has died had no interest in any trust.
- 6 The person who has died did not own property outside the UK.

IF ANY OF THE ABOVE APPLY TO YOUR SITUATION THE SCHEME WILL NOT BE AVAILABLE TO YOU.

WHAT YOU MUST DO TO TAKE ADVANTAGE OF THE PROBATE ASSIST SCHEME:-

- 1 Complete the answers to all questions on the enclosed questionnaire and collect all the relevant paperwork referred to in the questionnaire.
- 2 Read and sign the enclosed terms and conditions and a copy of this engagement letter.
- 3 Send the questionnaire, terms and conditions and engagement letter along with the accompanying documentation to us together with a cheque to cover our fixed fee of £960 inclusive of VAT and the Court fee of £155. If you require any official copies of the Grant of Representation, (and we recommend one copy for each asset that there is), then you need to add £0.50p for each copy you want to the £155.00 fee.
- 4 Within seven working days, provided all the information is satisfactorily completed in the questionnaire, we will prepare the application for the Probate Registry, which we can send to you or you can call to collect. Part of the process needs you to swear an oath in the presence of an independent solicitor who will charge a small fee of about £10.00 for that service. We can make arrangements for you to do this if you are local to our offices.
- 5 You must then return the sworn oath and all other forms completed and we will lodge the application with the Probate Registry the same or following day.
- 6 Dependent upon the workload of the Probate Registry the Grant of Representation will be available 2 - 3 weeks after it is lodged and we will send this to you by special delivery or arrange for you to collect it from the office when convenient.

IMPORTANT NOTES:-

- 1 Part of the application requires us to complete Inheritance Tax form 205. The information that you give us will be used to complete the form. We will complete the form as your tax agent but the responsibility for the information contained in it will be yours and yours alone. You must understand that you may have to pay tax penalties if the answers to the questions or figures that you give are wrong because of your fraud or negligence. If, subsequently, assets come to light which mean that the estate does not conform with items 1-6 on page 5 then you must report any changes immediately to the Capital Taxes Office. If this does happen we can offer you further help. The full and accurate completion of the questionnaire is therefore vital. If the questionnaire is incomplete in any regard we will not be able to offer the service.
- 2 This service does not include any other services or advice in connection with this matter. Any additional advice or time spent by us will be invoiced separately at the rate of £185 plus VAT per hour.

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CHECKLIST

In order to help you send the correct documents we have annexed a checklist for you to work through to ensure that the process is as smooth and efficient as possible. We look forward to working with you.

Have you enclosed:-

- 1 The completed questionnaire
- 2 Any documents referred to in the questionnaire
- 3 Your cheque for the fees
- 4 A certified copy of the passport and utility bill of each Executor
- 5 The signed duplicate of this letter
- 6 The signed terms and conditions

Signed:.....

Name:.....