

Probate and Estate Administration – Pricing Information

Andrew Isaacs Law Limited assists personal representatives with:

1. obtaining a Grant of Probate or Letters of Administration only; or
2. administering the whole estate, including collecting assets, paying liabilities and distributing the estate.

The information below applies to uncontested estates. A tailored written estimate will be provided once sufficient details of the estate have been received.

Our Hourly Rates

Probate and Estate Administration work is charged according to the time spent, rather than as a percentage of the estate.

Fee earner	Excluding VAT	VAT at 20%	Including VAT
Grade A – solicitors and legal executives with over eight years' experience	£288.00	£57.60	£345.60
Grade B – solicitors and legal executives with over four years' experience	£247.00	£49.40	£296.40
Grade C – other solicitors, legal executives and fee earners of equivalent experience	£200.00	£40.00	£240.00
Grade D – trainee solicitors, paralegals and other fee earners	£142.00	£28.40	£170.40

The person responsible for the matter, and their applicable rate, will be confirmed before work begins.

Grant-Only Applications

For a straightforward, uncontested estate where no inheritance tax is payable, our estimated fees are:

Estimated fees excluding VAT	VAT at 20%	Estimated fees including VAT
£500–£1,500	£100–£300	£600–£1,800

This normally includes:

- reviewing the Will and identifying the appropriate personal representatives;
- reviewing the information provided about the estate;
- preparing the probate application and standard estate reporting information;
- submitting the application;
- dealing with routine Probate Registry requisitions; and
- providing the Grant once issued.

This estimate assumes that the Will or intestacy position is straightforward, all required information is available, all personal representatives cooperate, no inheritance tax is payable, and there are no disputes, foreign assets, complex Trusts or business or farming assets.

Full Estate Administration

Typical fee ranges are:

Type of estate	Excluding VAT	VAT at 20%	Including VAT
Simple estate: limited assets, no inheritance tax, property sale or dispute	£1,500–£4,000	£300–£800	£1,800–£4,800
Standard estate: several assets, property and multiple beneficiaries, without significant tax complexity	£4,000– £10,000	£800– £2,000	£4,800– £12,000
More complex estate: inheritance tax, lifetime gifts, Trusts, business or farming assets, shareholdings or detailed HMRC correspondence	£10,000– £35,000 or more	£2,000– or £7,000 or more	£12,000– or £42,000 or more

Full administration will usually include:

- identifying the personal representatives, beneficiaries, assets and liabilities;
- obtaining date-of-death asset values;
- preparing the probate and inheritance tax documents;
- applying for the Grant;
- collecting estate assets;
- paying liabilities;
- preparing estate accounts; and

- distributing the estate to the beneficiaries.

Fees may increase if there are numerous or unusual assets, lifetime gifts, tax issues, missing information, difficulties locating beneficiaries, disputes, urgent work or delays by third parties. Any material change to the estimate will be discussed before additional work is undertaken

Tax Work

Our fees include consideration of inheritance tax to the extent required to prepare the probate application and any agreed inheritance tax account.

The firm's Tax Department is run by George Isaacs ACCA ATT, Taxation Technician. Where appropriate, a matter may be referred to George for support concerning inheritance tax, lifetime gifts, Business Relief, Agricultural Property Relief, capital gains tax, estate income tax or Trust taxation.

George's time is ordinarily charged at £200 plus VAT per hour (£240 including VAT) unless another arrangement is agreed.

The estimates above do not include standalone tax planning, tax returns, substantive HMRC enquiries, complex Trust tax advice, contentious tax work or specialist cross-border advice unless agreed in writing. If an issue falls outside the firm's scope or expertise, this will be explained and referral to an appropriate external specialist may be recommended.

Disbursements

Disbursements are third-party charges payable in addition to our fees:

Disbursement	Current charge
Probate application fee	£300, no VAT. One copy of the Grant is included.
Additional copies of the Grant ordered when the probate application is submitted	£1.50 per copy, no VAT
Additional copies requested after the probate application has been submitted	£16 per copy, no VAT
Bankruptcy-only Land Charges search against a beneficiary	£6 per beneficiary, no VAT
HM Land Registry official copy of the register or title plan	£6 per document plus VAT (£7.20 including VAT)

Statutory notice in <i>The Gazette</i>	£96.55 plus VAT per notice (£115.86 including VAT)
Combined <i>Gazette</i> and local newspaper notice arranged through <i>The Gazette</i> web template service	£240 plus VAT (£288 including VAT)
Local newspaper notice arranged independently	Typically, £50–£150, depending on the publication and length of the notice. VAT may apply.
Valuer, tracing agent, genealogist, expert or foreign lawyer fees	Quoted before instruction; VAT may apply.

These charges are current but subject to change. The amount payable will be the fee charged by the relevant third party when the service is requested. The client will be notified before any significant disbursement is incurred.

Work Not Included

Unless agreed separately, the estimates do not include:

- contested probate or claims against the estate;
- disputes between personal representatives or beneficiaries;
- conveyancing for estate property;
- Deeds of Variation;
- tax returns or detailed tax planning;
- Trust creation or ongoing Trust administration;
- foreign assets;
- non-routine Court applications;
- tracing missing beneficiaries;
- insolvent estates; or
- advice to beneficiaries about their individual tax positions.

If additional work is required, its scope and likely cost will be confirmed separately. If it falls outside the firm's expertise, the client will be informed and an external referral may be recommended.

Timescales

A straightforward Grant-only application will usually be prepared within two months after all required information has been received. The Probate Registry's processing time is additional and may vary.

Straightforward full Estate Administration commonly takes 6 to 12 months. Estates involving inheritance tax, property, Trusts, business assets, HMRC enquiries or beneficiary difficulties may take longer.

The principal stages are:

1. obtaining information and asset values;
 2. preparing the probate and tax documents;
 3. applying for the Grant;
 4. collecting assets and paying liabilities;
 5. preparing estate accounts; and
 6. distributing the estate.
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