

Legacy Probate & Estate Planning Limited



LEGACY PROBATE

Probate Made Simpler

Helping Executors Navigate Probate With Confidence

Losing a loved one is one of life's most difficult experiences. Dealing with legal paperwork, financial institutions and estate administration can feel overwhelming, particularly when you are grieving.

At Legacy Probate, we provide hands-on probate support designed to ease the administrative burden on Executors and families. We assist with locating and organising estate information, can provide a full estate search, co-ordinating the application process and helping keep matters moving efficiently. For clients who want or need a full administration of the estate, we can introduce them to one of our carefully selected panel solicitors who can undertake this administration and any legal work.

Understanding probate

Probate is the legal process of administering a person's estate after they have died. Where a valid Will exists, the Executor named in that Will would usually apply for a Grant of Probate. This legal document gives the Executor authority to deal with the deceased's assets and liabilities. If there is no Will, an eligible family member may apply for Letters of Administration instead.

The Grant may be required before:

- Banks release funds
- Investments are sold or transferred
- Property can be sold or transferred
- Financial institutions recognise the Executor's authority

Every estate is different and the need for probate depends on the nature and value of the assets involved.

You can be assured that any work carried out by Legacy Probate is covered by our professional indemnity insurance. This keeps you safe in the knowledge that you are protected. Please refer to our Terms of Business for details.

Do I Need Probate?

Probate may be required if:

- ✓ The deceased owned property in their sole name or the property was owned Tenants in Common
- ✓ There is a Trust in the deceased's Will or they had a Trust in place during their lifetime.
- ✓ There are investments, shares or significant savings
- ✓ Banks or financial institutions require a Grant before releasing funds
- ✓ Assets cannot be transferred without proof of authority

Probate may not be required if:

- ✓ Assets owned jointly as joint tenants
- ✓ Accounts pass automatically to a surviving spouse or partner
- ✓ Institutions confirm that funds can be released without a Grant
- ✓ The estate is relatively small

We offer a free initial consultation to help assess whether probate may be required.



The Probate Process

Although every estate is different, most follow the same general process:

Step 1 - Register the death

Obtain official copies of the death certificate.

Step 2 - Locate the Will

Identify the Will and confirm who has authority to act.

Step 3 - Identify assets and liabilities

Compile details of property, bank accounts, investments, debts and liabilities.

Step 4 - Value the estate

Establish the value of the estate for probate and tax purposes.

Step 5 - Complete inheritance tax forms

Prepare and submit any required inheritance tax documentation.

Step 6 - Apply for probate

Submit the application to the Probate Registry.

Step 7 - Administer the estate

Collect assets, settle liabilities and distribute the estate.

Our Probate Application Service assists with the probate application stage. Full administration can be undertaken through a panel solicitor if required.

How we can help

We offer two levels of support to suit different circumstances.

Option 1: Probate Application Service

Ideal for Executors who wish to retain control of the estate but would like assistance preparing probate documentation.

Option 2: Full Estate Administration

For full estate administration we can refer you to one of our panel of solicitors. You are under no obligation to use a solicitor recommended by us and remain free to obtain independent quotations or choose your own solicitor.

Probate Application Service

Practical support for Executors

Our Probate Application Service is designed for straightforward estates where Executors intend to administer the estate themselves but require assistance with the probate application process.

Our service includes

- ✓ Helping Executors gather estate information and provide an estate search facility
- ✓ Review of information provided
- ✓ Preparation of probate application documentation
- ✓ Preparation of inheritance tax forms within agreed scope
- ✓ Supporting schedules where required
- ✓ Administrative support throughout the application process
- ✓ Assistance with probate-related documentation
- ✓ Guidance on procedural requirements
- ✓ Reducing administrative burdens for Executors

Your responsibilities

As Executor or Administrator, you remain responsible for:

- Signing off the estate valuation, once the estate assets and liabilities information has been obtained
- Providing accurate information
- Collecting estate assets
- Paying liabilities
- Preparing estate accounts
- Distributing the estate

Our service is a limited administrative support service and does not include legal advice, tax advice, financial advice, investment advice or full estate administration.



Probate Application Fees

Estates valued under £100,000

£1,674 (inclusive of VAT)

Estates valued at £100,000 or more

1.5% of the Gross Estate Value (inclusive of VAT)

£1,674 (inclusive of VAT) - this is our minimum fee.

Fees include support with the preparation of the probate application and associated documentation within the agreed scope of work.

Additional costs

Third-party costs may also apply, including:

- Probate Registry fees
- Property valuations
- Land Registry fees
- Asset searches
- Bankruptcy searches
- Other estate-related disbursements

A full written quotation will be provided before any work begins.

Full Estate Administration

A complete Estate Administration Service

Some estates require additional support due to complexity, inheritance tax considerations or legal issues.

In these circumstances, we may recommend referral to one of our approved panel solicitors who can provide a complete estate administration service.

Examples include:

- Inheritance tax complexity
- Multiple properties
- Trusts
- Foreign assets
- Business interests
- Missing Beneficiaries
- Executor disputes

What the solicitor can do

A panel solicitor may:

- | | |
|---|---------------------------------------|
| ✓ Obtain the Grant of Probate | ✓ Handle property sales and transfers |
| ✓ Deal directly with banks and financial institutions | ✓ Deal with HMRC requirements |
| ✓ Collect estate assets | ✓ Distribute funds to Beneficiaries |
| ✓ Pay liabilities and debts | ✓ Provide legal advice where required |
| ✓ Prepare estate accounts | |

Once instructed, the solicitor becomes responsible for the legal services provided and their own Terms of Business and complaints procedures will apply.



Full Estate Administration Fees

From 2.1% of the Gross Estate Value (inclusive of VAT)

The exact fee will depend upon:

- The panel solicitor selected
- Estate value (please note that minimum fees may apply)
- Estate complexity
- Legal and tax considerations

All fees relating to Full Estate Administration are payable directly to the instructed solicitor.

A fixed quotation or fee proposal will be provided by the solicitor before any work commences.



Comparing Your Options

Probate Application Service

- ✓ Executor remains in control
- ✓ Probate documentation prepared
- ✓ Inheritance tax forms within agreed scope
- ✓ Administrative support
- ✓ Estates valued under £100,000 £1,674 (inclusive of VAT).
- ✓ Estates valued at £100,000 or more 1.5% of the Gross Estate Value (inclusive of VAT), £1,674 (inclusive of VAT) - this is our minimum fee.
- ✗ Collection of estate assets
- ✗ Distribution of estate funds
- ✗ Estate accounts
- ✗ Legal advice

Full Estate Administration

- ✓ Probate application
 - ✓ Collection of assets
 - ✓ Estate accounts
 - ✓ Debt settlement
 - ✓ Property sales and transfers
 - ✓ Distribution to Beneficiaries
 - ✓ Legal advice
 - ✓ HMRC and tax administration
 - ✓ From 2.1% of Gross Estate Value (inclusive of VAT)
- (minimum fee may apply)



Frequently Asked Questions

Q: Do I need probate?

A: Not always. Whether probate is required depends upon the nature and value of the assets held within the estate.

Q: How long does probate take?

A: Timescales vary depending on estate complexity, HMRC processing times, Probate Registry timescales and third-party organisations. Any estimate provided is not guaranteed.

Q: Will I need a solicitor?

A: Not necessarily. Many straightforward estates can be handled through our Probate Application Service. More complex estates may benefit from legal assistance from a solicitor.

Q: Do I have to use your panel solicitor?

A: No. You are free to instruct any solicitor of your choice and are under no obligation to use a solicitor recommended by us.



Frequently Asked Questions

Q: Can you hold estate money?

A: No. We do not receive, hold or distribute estate funds as part of our Probate Application Service.

Q: Do you provide legal advice?

A: No. We are not a law firm and do not provide legal advice, financial advice, investment advice or tax advice.

Q: Do you receive referral fees?

A: If any referral fee or financial benefit is received in relation to a solicitor referral, this will be disclosed to you before any referral takes place.

Q: What if no Will exists?

A: The estate may be administered under the Rules of Intestacy, which determine who can apply and who inherits.



Getting Started

A Simple Three-Step Process

Step 1: Free initial consultation

We will discuss the estate, explain the probate process and help identify the most suitable service.

Step 2: Receive your personalised quotation

Before any work begins, you will receive:

- ✓ A written quotation
- ✓ Your Letter of Engagement
- ✓ Details of our fees
- ✓ Details of anticipated third-party costs
- ✓ Confirmation of what is and is not included

Step 3: We help you move forward

Once instructed, we will begin assisting with your probate application or, where appropriate, facilitate a referral to a panel solicitor for full estate administration.

There is no obligation to proceed following your consultation.

Why Choose Legacy Probate?

Legacy Probate

Our service includes

- ✓ Friendly and compassionate support
- ✓ Clear fixed-fee pricing
- ✓ Nationwide service
- ✓ Experienced estate planning team
- ✓ Clear explanation of your options
- ✓ Flexible levels of support
- ✓ Freedom to choose your own solicitor
- ✓ Written quotations before work begins

Contact us

Legacy Probate & Estate Planning Limited

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Important Regulatory Information

Legacy Probate & Estate Planning Limited is not a firm of solicitors and is not authorised by the Solicitors Regulation Authority to provide reserved legal services.

Our Probate Application Service is a limited administrative support service designed to assist with probate-related documentation using information supplied by you. The Grant of Probate is applied for through one of our panel solicitors.

We do not provide legal advice, financial advice, investment advice, tax advice or full estate administration as part of this service.

Where legal advice or full estate administration is required, we may recommend referral to an independent panel solicitor. You are under no obligation to instruct any solicitor we recommend and remain free to obtain independent quotations or seek advice elsewhere.

Any referral recommendation is based on suitability for your circumstances. If any referral fee or financial benefit is received, this will be disclosed before any referral takes place.

Quotations for both services will be provided within your Letter of Engagement before work commences. Full details of our service, fees, complaints procedure, cancellation rights and data protection arrangements are available in our Terms of Business.

Part of a family of estate planning businesses



LEGACY WILLS

*Protecting your wishes
for the future*



LEGACY EXECUTORS

*Professional Executor
services and estate
administration support*



LEGACY

Home Protect

*Helping protect
family homes and
assets*



LEGACY PROBATE

*Supporting families
through probate*

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Legacy Probate & Estate Planning Limited is registered in England no.17318106.
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