

Probate

Summary of work

Pre-Grant work

- Initial meeting & considering all information supplied
- Obtaining date of death valuations for the estate assets
- Ascertaining date of death liabilities
- Writing to pension providers
- Obtaining from you details of lifetime gifts and considering the same
- Notifying the legatee(s) of his/her/their legacy(ies) under the Will. Obtaining payment details from him/her/them
- Notifying the residuary beneficiaries of their inheritance and obtaining payment details from them
- Carrying out bankruptcy searches against all beneficiaries
- Making an Unclaimed Assets Register search, if requested
- Placing Statutory Advertisements for unknown creditors, if required
- Once the relevant information is available producing a schedule setting out all of the assets and liabilities as at date of death sending to you
- Prepare Inheritance Tax (IHT) Account form IHT205 or IHT400
- Drafting Statement of Truth for Executors/Administrators
- Meeting to go through the probate papers

- Arranging for the signing of the probate documents
- Arranging for IHT to be paid out of the deceased's cash assets (excluding arranging for any loan requirements)
- Lodging the executed probate documents as required and extracting the grant of representation
- Dealing with the deceased's income and capital gains tax position.

Post-Grant work

- Collecting in the estate assets
- Discharging the estate's liabilities
- Maintaining draft Estate Accounts, inputting entries, periodic updating and finalising them at the end of the estate administration
- Providing advice to the executors/administrators as to timings and distributions
- Dealing with estate administration period for income and capital gains tax purposes either on an formal or informal basis with HM Revenue & Customs
- Settling the money legacies
- Finalising the Estate Accounts, obtaining the approval of the executors, making final distributions and providing copies of the accounts to the residuary beneficiaries
- Providing certificates of income for estate income to the residuary beneficiaries.

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