



## **Administration of an estate**

When dealing with the administration of an estate (often referred to as Probate) our highly experienced Private Client team will explain the administration process to you clearly so that you are aware of the steps that need to be taken throughout. We support our clients in what can be a long and difficult process and aim to ensure that the legal aspects run as smoothly as possible.

We offer a bespoke service to our clients and understand that no two estates are the same. We understand that as well as a high level of service, clients are also mindful of legal costs and we will always be transparent about these from the outset.

### **Legal Fees and Disbursements**

Legal Fees are the amount you will be required to pay for all of the work performed by us in actioning your instructions, from commencement of your case to conclusion.

VAT will be payable on our fees and some disbursements, currently 20%, and we will clearly confirm which disbursements carry VAT in our formal quotation or as we advise you to incur them.

### **Our Private Client Team**

Our Private Client team includes two Partners, a Senior Associate Solicitor, a solicitor and a Paralegal. Their work is charged on a time spent basis. All fee earners in the Firm accurately record the time spent on an individual matter. Hourly rates depend on the experience of the person handling the work but range from £175 plus VAT at 20% (£210.00 inc. VAT) to £420 plus VAT at 20% (£504.00 inc. VAT) per hour.

### **Administration of an Estate**

At the beginning of each new matter we aim to provide you with a clear estimate of the Firm's fees taking into account the different variables that arise in each estate.

Often clients will utilise the Firm's services for the work required up to the point at which the Grant of Representation is obtained from the Court before assuming the administration themselves. Alternatively, we can be instructed to deal with the entire administration process from start to finish.

When dealing with an estate the following steps would need to be undertaken:

- Identifying our client and complying with stringent guidelines as set out by the SRA and the Law Society in terms of identification procedures.
- Locating a valid Will with / without Codicils or identifying where an application on behalf of an estate has to be made under the intestacy rules.
- Considering the terms of a Will and the position in relation to potential beneficiaries

- Ascertaining details of the size of an estate and in terms of assets and liabilities.
- Submitting Statutory Notices.
- Preparing Inheritance Tax papers if the estate is subject to Inheritance Tax (IHT 400).
- Considering the tax position, arranging tax payment and submitting Tax Return to HMRC. This will also include considering the position re availability of tax allowances and lifetime gifting.
- Preparing the application for the Grant of Representation and thereafter submission of the same to the Probate Registry in order to obtain the Grant of Representation.
- Lodging the Grant of Representation with the financial institutions and third parties.
- Collecting in or transferring assets of the estate.
- Settling liabilities of the estate.
- Liaising with beneficiaries of the estate and paying any legacies made under the terms of the Will.
- Liaising with HMRC to pay any ongoing Inheritance Tax instalments and to obtain Inheritance Tax clearance in the estate.
- Advising in relation to Income Tax returns to the date of death and during the administration period and paying any income tax due.
- The preparation of detailed estate accounts showing all funds coming in and out of the estate during the administration period.
- Making interim and final distributions to beneficiaries.
- Dealing with insurance and utility providers regarding any property that falls within the estate.

Our fees for dealing with the administration of an estate would take into account several factors including the complexity of the estate, the amount and type of assets, the impact of lifetime gifting, the number of beneficiaries, any disputes or claims against the estate, the extent and availability of Inheritance Tax exemptions and reliefs and if there are any trusts established under the Will.

Our fees are calculated on a time spent basis in line with the fee earners hourly rate but typically would fall within the region of 1% to 2% (plus VAT at 20%) of the gross value of the estate.

#### **Factors that are likely to increase the cost of your matter:**

- Not having all the paperwork available or having incorrect information that needs investigation and correction.
- Third parties not responding to our communications promptly.
- Dealing with unusual or complex assets or items (for example: fine art; timeshares; shares in private companies etc).
- HMRC compliance investigations.
- Arranging and supervising house clearances.
- If there is no will or the estate consists of any share holdings (stocks and bonds) there is likely to be additional costs that could range significantly depending on the estate and how it is to be dealt with.
- Where there is Inheritance Tax (IHT) to pay\*
- Whether the grant of probate is likely to be contested
- Number and value of properties and whether they are outside England and Wales
- Whether there are any trusts in the Will
- Whether there are any missing beneficiaries

Estates over £325,000 may be subject to Inheritance Tax at the prevailing rates. \*To help you decide whether any Inheritance Tax is likely to be due or not, you can visit:

<https://www.gov.uk/valuing-estate-of-someone-who-died/estimate-estate-value>

As soon as any complications arise, we will discuss these with you and agree the fee for the additional work being carried out in advance of any additional work being undertaken.

### **How Long Will it Take?**

The timescales for dealing with the administration of an estate will vary depending on the assets held and the complexities that may be involved. Whilst a Grant of Representation can be obtained in 3 to 6 months, it can take any time from 6 months to several years to complete the full administration of an estate.

### **Disbursements**

**In addition to our fees there would be the following additional costs which may need to be paid:**

- Court fee £526 plus additional copies of the Grant of Representation £2.00 each
- Any professional valuations for property and shares
- Bankruptcy Searches £6 + VAT at 20% (£7.20 inc. VAT) per name
- Fees regarding preparation of income tax returns for the period to the date of death and for the period of administration.

### **Other Costs**

- To comply with anti-money laundering legislation and satisfy our regulatory commitments, we carry out online identity checks on all clients and, in probate matters, on each beneficiary. Our fee for this is £30 + VAT at 20% (£36.00 inc. VAT) per check. This fee is payable on all cases and is in addition to the fees quoted above.
- Bank Transfer Administration Fee, per transfer - £40 + VAT at 20% (£48.00 inc. VAT), where applicable.

### **We will not:**

Please note that dealing with the sale of any properties in the estate is not included as part of our Probate and estate administration fees, but we would be pleased to provide a separate quote for this

**If you would like to discuss further please do not hesitate to contact a member of the Private Client team.**

### **Our Private Client Team**

Below you can see the members of our Private Client team. Regardless of who works on your matter, they will be supervised by Sarah Strong, Partner and Head of our Tax planning Wills, Probate & Trusts team.

Katie Gillam  
Sarah Strong  
Katie Hancock  
Courtney Magnus  
Peggy Hendley

**All fees are correct as of 13 July 2026.**