

Estate Administration Full Service

Private client solutions for the St. James's Place Partnership

What is it?

The complete administration of an estate on behalf of its personal representatives (PRs), including all steps necessary to obtain a Grant of Representation and fully distribute the estate.

Who is it for?

The Estate Administration Full Service product is suitable for PRs of any estate where a full Estate Administration service is required.

It is most suitable for any estate where the PRs do not have the time or desire to deal with detailed administration, and all estates which are tax paying, less than straightforward, or where there are lifetime gifts or trusts involved or any contentious aspects.

What will we provide you with?

The Estate Administration Full Service consists of:

- obtaining details of the assets and liabilities in the estate;
- preparing the HMRC Return and Probate application papers;
- arranging for payment of tax;
- agreeing tax liabilities with HMRC;

- advising on tax efficient administration;
- realising assets;
- paying debts and administration expenses;
- advertising for creditors;
- paying legacies and distributing the residuary estate;
- preparing Estate Accounts and income tax certificates; and
- agreeing administration income tax liabilities with HMRC.

The cost

The fees payable will be based on an hourly rate or fixed estimate depending on the nature of the estate.

Please contact us for details.

For further information please contact:

Bristol

Anthony Fairweather 0345 209 1265
anthony.fairweather@clarkewillmott.com

Bristol and Cardiff

Jane Halton 0345 209 1417
jane.halton@clarkewillmott.com

Bristol and London

Carol Cummins 0345 209 1275
carol.cummins@clarkewillmott.com

Liz Smithers 0345 209 1115

elizabeth.smithers@clarkewillmott.com

Manchester and Birmingham

Paul Davies 0345 209 1783
paul.davies@clarkewillmott.com

Southampton

Emma Pope 0345 209 1823
emma.pope@clarkewillmott.com

Taunton

Tom Chiffers 0345 209 1693
tom.chiffers@clarkewillmott.com

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Offices

Birmingham Office

7th Floor, 9 Colmore Row, Birmingham B3 2BJ
T: 0345 209 1000
F: 0345 209 2001

Bristol Office

1 Georges Square, Bath Street, Bristol BS1 6BA
T: 0345 209 1000
F: 0345 209 2002

Cardiff Office

2nd Floor, Emperor House, Scott Harbour,
Pierhead Street, Cardiff CF10 4PH
T: 0345 209 1000
F: 0345 209 2002

London Office

5 St Helen's Place, London EC3A 6AB
T: 0345 209 1000
F: 0345 209 2514

Manchester Office

55 Spring Gardens, Manchester M2 2BY
T: 0345 209 1000
F: 0345 209 2005

Southampton Office

Burlington House, Botleigh Grange Business Park,
Hedge End, Southampton SO30 2AF
T: 0345 209 1000
F: 0345 209 2003

Taunton Office

Blackbrook Gate, Blackbrook Park Avenue,
Taunton TA1 2PG
T: 0345 209 1000
F: 0345 209 2004