

Estate Administration (Application only) Service

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

What is it?

Preparation of the application for a Grant of Representation

Who is it for?

The Estate Administration (Application only) Service is suitable for personal representatives (PRs) of straightforward, non-contentious estates where a full Estate Administration service is not required.

What will we provide you with?

The Estate Administration (Application only) Service consists of the production of all the paperwork necessary to obtain a Grant of Representation to an estate, including the return to HMRC and the application papers for the Probate Registry.

The HMRC Return will be prepared on the basis of information and valuations obtained by the PRs, and the details that they supply to us about any lifetime gifts or other matters which could affect any Inheritance tax liability.

We will submit the Grant application, and once the Grant is received pass it, and any official copies, over to the PRs who will then be responsible for collecting in the assets, agreeing tax matters with HMRC, paying legacies, advertising for creditors, and distributing and accounting for the estate assets to the beneficiaries.

The cost

- Where a limited HMRC Return is due: Please contact us for further information.
- Where a full HMRC Return is due: Please contact us for further information.

These fees are dependent on all details of the assets and liabilities being supplied to us prior to preparation of the HMRC Return. If amendments are required after the HMRC Return has been prepared we reserve the right to charge an additional fee.

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Disclaimer: This briefing is intended to highlight issues only for the purposes of general interest and is not intended to be a comprehensive statement of the law. Although we have taken care over the information, you should not rely on it as legal advice. We do not accept any liability to anyone who does rely on its content. Last updated: July 2017. Ref: 13094461-3.

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Great service... Great people...

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