

* Clarke Willmott Fee Schedule

For the St. James's Place Partnership

February 2021

Will packages	1	Estate administration and implementation	
▪ Asset Protection Wills	1	▪ Full estate administration services	1
▪ Next Generation Protection Wills	1	▪ Grant only (IHT 205)	1
▪ Family Protection Wills	1	▪ Grant only (IHT 400)	1
▪ Flexible Will for a single person	1	▪ Transferable nil rate band claim pack	1
▪ Exempt Asset trust bolt on	1	▪ Deeds of Variation	1
▪ Property Discount bolt on	1	Trust planning	2
▪ Lifetime planning	1	Lasting Powers of Attorney	2
▪ Creation of Lifetime Trust	1	▪ LPA Property and Financial Affairs	2
▪ Holiday Home Trust	1	▪ LPA Health and Welfare	2
▪ Helping children onto the property ladder	1	Contact information	3
▪ Family Investment companies	1	▪ Contacts	3
		▪ Offices	3



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Package or product	A fixed fee will be agreed once the structure and any additional work or enhancements to the structures have been agreed. Guide Price to Client (plus VAT).	SJP referral fee
Will packages		
▪ Flexible Will for a single person	£1,400 to £1,750 (single)	10% of the fee
▪ Asset Protection Wills	£1,750 to £2,250 (per pair)	10% of the fee
▪ Next Generation Protection Wills	£2,250 to £2,750 (per pair)	10% of the fee
▪ Family Protection Wills	£2,500 to £3,000 (per pair)	10% of the fee
▪ Exempt Asset trust bolt on ¹	£500 (single Will) to £700 (Mirror Wills)	10% of the fee
▪ Property Discount bolt on ¹	£500 (single Will) to £700 (Mirror Wills)	10% of the fee
▪ Right to occupy property ¹	£350 (single Will) to £500 (Mirror Wills)	10% of the fee
▪ Option to buy property ¹	£500 (single Will) to £700 (Mirror Wills)	10% of the fee
▪ Loan plan provisions ¹	£350 (single Will) to £500 (Mirror Wills)	10% of the fee
Lifetime planning		
▪ Creation of lifetime trust N.B Extra costs will apply for a transfer of a property to the trust.	£750 for due diligence and advice £1,500 for Trust Deed £500 for completion of IHT100 accounts	10% of the fee
▪ Holiday Home Trust – UK property only (If registered freehold property with no mortgage)	£900 for due diligence and advice Documentation from £2,300 Land registry fees may also be payable	10% of the fee
▪ Helping children onto the property ladder	£900 for due diligence and advice Documentation from £2,300 Land registry fees may also be payable	10% of the fee
▪ Family Investment companies	£10,000 to £15,000	10% of the fee
▪ Domicile review and report	£3,000 to £4,000	10% of the fee
Estate administration and implementation		
▪ Full estate administration	Please contact us for details. A fee estimate range and fixed fee alternative will be provided when we have sight of full details of the estate and the Will	10% of the fee
▪ Grant only (IHT 205)	£2,200 grant application based on records and valuations provided	10% of the fee

	Plus £500 for reviewing position if it is second death with NRBT on first death Any additional work or advice at hourly rates	
<ul style="list-style-type: none"> ▪ Grant only (IHT 400) (non-taxpaying estates due to value or spouse or charity exemptions only. Not available for taxable/business/agricultural relief estates) 	£2,950 grant application based on records and valuations provided Plus £500 for reviewing position if it is second death with NRBT on first death Any additional work or advice at hourly rates	10% of the fee
<ul style="list-style-type: none"> ▪ Transferable nil rate band claim pack 	£500	10% of the fee
<ul style="list-style-type: none"> ▪ Deeds of variation – add legacies, no trusts 	£1,000 ²	10% of the fee
<ul style="list-style-type: none"> ▪ Deeds of Variation on to discretionary trust ▪ Reporting on impact of existing Will and lifetime gifts of deceased (due diligence report) ▪ The Deed of Variation adding trusts or making gifts to existing trusts including tax and estate planning advice and documentation 	Due diligence report £750 Deed of Variation £2,000 ² Loan Arrangements £1,000	10% of the fee 10% of the fee 10% of the fee
<ul style="list-style-type: none"> ▪ Deed of Variation Loan Plan Package including due diligence report and deed of variation to vary the will to leave a legacy of the outstanding loan to the loan plan trustees 	Due diligence report £750 Deed of Variation £1,000 for 1 loan plan legacy and an additional £175 for each additional loan plan	10% of the fee
Trust Planning		
<ul style="list-style-type: none"> ▪ Review of existing nil rate band discretionary trusts and impact of residence nil rate band ▪ First death nil rate band discretionary trusts - review and/or late implementation ▪ Implementation of options: <ul style="list-style-type: none"> ▪ terminate trust; or ▪ loan and charge package; ▪ convert trust to life interest; or ▪ other trust restructuring ▪ Trustee appointment and retirement ▪ Trustee removal and replacement 	£850 Please contact us for details £850 £2,200 £1,600 Please contact us for details £800 Please contact us for details	10% of the fee 10% of the fee 10% of the fee 10% of the fee 10% of the fee
Lasting Powers of Attorney		

<ul style="list-style-type: none"> Business LPAs – to cover director or shareholder decisions 	<p>Initial fee of approx. £900 for due diligence and advice</p> <p>Typically £300 to £500 per LPA document for one donor with one business. Corporate review fees payable in addition</p>	10% of the fee
<ul style="list-style-type: none"> LPA – Property and Financial Affairs - with registration 	<p>£333.33 (single LPA)</p> <p>508.33 (pair of LPAs)³</p> <p>Plus registration fee of £82 per LPA</p>	<p>If SJPP fully completes and provides the LPA questionnaire a referral fee of £58.33 is payable, if not waived</p>
<ul style="list-style-type: none"> LPA – Health and Welfare – with registration 	<p>£333.33 (single LPA)</p> <p>£508.33 (pair of LPAs)³</p> <p>Plus registration fee of £82 per LPA</p>	
<ul style="list-style-type: none"> LPA – both types for single person - with registration 	<p>£508.33³</p> <p>Plus registration fee of £82 per LPA</p>	
<ul style="list-style-type: none"> LPA – both types for a couple – with registration 	<p>£908.33³</p> <p>Plus registration fee of £82 per LPA</p>	

For more information on these products please refer to the Clarke Willmott Packages and Products guide for the St James's Place Partnership. This can be found on Clarke Willmott page on the SJP intranet, the SJP area of the CW website (<http://clrkwlmt.uk/1r3KK6k>) or can be provided on request by contacting your usual contact or emailing sjp@clarkewillmott.com.

¹ These products may be added to the following packages: Asset Protection Wills, Next Generation Protection Wills or Family Protection Wills.

² These fees only apply where instructions to effect the variation are received at least two months prior to the expiration of the two year variation period.

³ Does not include certification of the LPA (charged according to time spent – minimum £35 per LPA).

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