

We provide a full non-contentious probate service to our clients. This can include acting as an executor, extracting probate, managing the estate and dealing with HM Revenue and Customs as necessary.

The probate services we provide include a wide range of services and so providing an exact quote can be difficult.

Below we provide estimates of our costs for non-contentious probate. We charge on an hourly rate, whereas the charges of many other providers of non-contentious probate services are based on a percentage of the value of the estate. This can for example, lead to a disproportionate charge on, say, large but fairly straightforward estates. We can also, of course, provide tax advice which is often needed once a loved one has passed away.

Basic extraction of probate

We will prepare the relevant forms for submission to The Probate Registry and obtain a Grant of Probate for the Executors. This will include meeting with the Executors, drafting the relevant forms and submitting these forms with the Probate Registry, and HM Revenue and Customs where necessary.

Fees for this service start from £1,500 plus VAT which may increase if we are required to spend additional time collecting information from third parties about the estate. We will only ask for additional information where this is required for the forms to be submitted to The Probate Registry and HM Revenue and Customs as necessary.

An estate falling into this category would likely include the following assets:-

- A main residence
- Bank accounts (joint or solely owned)
- ISA investments
- Investments managed by a broker

Advanced extraction of probate

As above, we will prepare the relevant Inheritance Tax forms and submit these to The Probate Registry and HM Revenue and Customs.

With larger and more complex estates fees can be in the region of £2,500-5,000 plus VAT. If there is a business to be valued then we can provide this valuation and can quote at the time.

Tax advice may also be required e.g. after the death of a spouse or the transfer of investments or assets.

An estate falling within an “Advanced” estate would likely include some or all of the following assets:-

- Main residence
- Investment property
- Bank accounts (jointly or solely owned)
- ISA investments
- Investments in a business / farm
- Investments managed by a broker
- Personally held investments
- Trusts

These estates are understandably more complex and will take time to prepare.

Timescales

The extraction of probate can take several months. This is dependent on the size of the estate, the speed at which we obtain information regarding the estate and how quickly queries are answered.

For smaller “excepted” estates the time taken to extract probate is generally two to three months.

For larger estates where Inheritance Tax is due, the process can take longer because HMRC processes Inheritance Tax Returns before the Probate Registry can begin their work. Only once HM Revenue and Customs are satisfied with the Inheritance Tax position can the Probate Registry issue the Grant of Probate.

Who will be dealing with my case?

Victoria Gould has been a qualified Chartered Accountant for over 25 years and has been authorised in the field of probate services since 2018.

Where to direct any complaints

Apple Tree Accountancy Ltd is an ICAEW accredited firm providing non-contentious probate services. We are regulated by the ICAEW which is an approved regulatory body for probate services. We follow the recommended guidance and procedures in respect of complaints and are covered by the ICAEW compensation scheme as set out below.

If you are dissatisfied with the service we provide, our formal complaints procedure directs you to Victoria Gould initially. We request any complaint be submitted to us in writing, either by email or letter. We take all complaints very seriously and will consider carefully any complaint you may make about our services as soon as it is received. We will take all action required to resolve the issue.

Any complaint received will be acknowledged within five business days of its receipt and we will endeavour to deal with it within eight weeks. If we do not deal with it in this timescale or you are unhappy with our response you may of course take the matter up with our professional body the Institute of Chartered Accountants in England and Wales

(see <https://www.icaew.com/regulation/complaints-process/make-a-complaint>) and/or the Legal Ombudsman.

Complaints to the Legal Ombudsman should be made within six years of the act of omission or within three years of you becoming aware of the issue and in either case within six months of our written response to your complaint to us.

The contact details for the Legal Ombudsman are:

Legal Ombudsman, PO Box 15870, Birmingham B30 9EB

Email – enquiries@legalombudsman.org.uk

Compensation arrangements

In the unlikely event that we cannot meet our obligations to you, you may be able to seek a grant from the Institute of Chartered Accountants in England and Wales' compensation scheme. Generally, applications for a grant must be made to ICAEW within twelve months of the time you become aware, or reasonably ought to have been aware, of the loss. Further information about the scheme and the circumstances in which grants may be made is available on ICAEW's website: www.icaew.com/probate