



Probate

Price and Service Information

At Bullimores we pride ourselves on being trusted professional advisers. We always aim to ensure people have accurate and relevant information about us when they are considering using our probate services.

We always meet with potential clients to discuss their requirements before giving an indication of our likely fees and will be able to provide a quote for the work needed. We invoice on a time taken basis and our charge out rates are based on the experience of the member of staff working on the case. We never take a percentage fee based on the value of the estate.

As our fee indications are bespoke, we have set out three scenarios to give you some idea of our likely fees.

Scenario 1

Obtaining a grant of probate (easily identifiable low value assets).

We are dealing with a new client whose mother has recently died.

Her mother was a widow, so the last surviving parent.

There is a valid, non-contested will.

The daughter, our client, has been named as the sole executor in the will.

The total value of the estate is £200,000 and consists mainly of bank accounts.

There are no complicating factors.

We will need to help our client to obtain a grant of probate, but we have not been asked to administer the estate.

Total fees between £1,800 to £2,400 (including VAT)

Scenario 2

Calculating Inheritance Tax and obtaining a grant of probate (high value assets, easily identifiable, simple will).

We are dealing with a new client whose mother has recently died.

Her mother was a widow, so the last surviving parent.

There is a valid, non-contested will.

The daughter, our client, has been named as the sole executor in the will.

There may be one or few beneficiaries.

Valuations have been reasonably easy to obtain and there were no complicating factors.

We will need to help our client to obtain a grant of probate and prepare the relevant Inheritance Tax forms (IHT400), but we have not been asked to administer the estate, but may need some assistance with the administration of the estate.

Total fees between £2,400 and £6,000 (including VAT)

Scenario 3

Full administration of estate including obtaining a grant of probate (complex).

We are dealing with a new client whose father has recently died.

His father was a widower, so the last surviving parent.

The deceased also inherited the entire estate of their spouse.

There is a valid and non-contested will.

The son, our client, has been named joint executor in the will with his sibling.

The total value of the previously inherited estate is £370,000 and the value of the estate in question is £350,000. The combined total takes the value of the estate over the IHT threshold.

The estate includes cash, residential properties, a property abroad and a private pension scheme.

We will need to help our client to obtain a grant of probate and administer the estate.

Total fees between £9,600 and £14,400 (including VAT)

Disbursements

Probate Application Fees are £300. There is a small additional charge for extra copies of the Grant of Probate.

Bankruptcy search – £5 per beneficiary

Notification in The London Gazette and a local newspaper of the individuals death to protect against claims from unknown creditors – £300 to £500.

Timescales

On average, estates such as the scenarios above are dealt with within 6 - 9 months. If an inheritance tax account is needed then the process could take longer as HMRC have to confirm that all the inheritance tax has been paid before issuing a code to allow probate to be applied for. Typically, obtaining the grant of probate takes 4 - 8 weeks. Collecting assets then follows, which can take 4 - 8 weeks. Once this has been done, we can distribute the assets, which normally takes 4 - 8 weeks. A large part of the process is dependent on third parties so these time frames are only a guide.

Regulatory Information

Licensed by the Institute of Chartered Accountants in England and Wales to carry out the reserved legal activity of non-contentious probate in England and Wales.

Details of our probate accreditation can be viewed at icaew.com/probate under reference number C001506055.

Bullimores maintains professional indemnity insurance in accordance with the rules of the Institute of Chartered Accountants in England and Wales. In accordance with the disclosure requirements of The Provision of Services Regulations 2009, our professional indemnity insurer is Tokio Marine HCC of 1 Aldgate, Walbrook, London EC3N 1RE. The territorial coverage of our policy is worldwide excluding USA/Canada.

The results of our diversity survey can be viewed in this [diversity results PDF](#).

Compensation Scheme

In the unlikely event that we cannot meet our liabilities to you, you may be able to seek a grant from ICAEW's Compensation Scheme. Generally, applications for a grant must be made to ICAEW within 12 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.

Complaints

We look to provide clients with a high level of service but should you feel that we have not delivered on this, please let us know by contacting the head of legal practice / probate contact partner Carolyn Scott. We will consider carefully any complaint that you may make about our probate services as soon as we receive it and will look to resolve the issue. We will acknowledge your complaint within five business days of its receipt and endeavour to deal with it within 8 weeks. Any complaint should be submitted to us in writing.

If we do not deal with it within this timescale or you are unhappy with our response you may of course take the matter up with our professional body, ICAEW, and the Legal Ombudsman. Complaints to the Legal Ombudsman should be made within six years of the act or 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:

Letter: Legal Ombudsman, PO Box 6806, Wolverhampton, WV1 9WJ

Email: enquiries@legalombudsman.org.uk

Telephone: 0300 555 0333.

