

Fees, Services and Packages Overview (2017 – 2018 Tax Year)

Standard / Basic Last Will & Testament

FREE for those under 65 / Single person £139 / Couple £199

Our standard will writing service includes the features on the right and allows you to fully distribute your estate and appoint Executors, Trustees, and Guardians to deal with all other matters.

Whilst many clients require nothing more than a simple will, additional advice or services may be advisable where you:

- Have an IHT (Inheritance Tax) liability;
- Wish to disinherit close family members or dependants;
- Own a business (or a share in a business);
- Own assets abroad (including Scotland);
- Wish to protect property or assets.

Should it become clear that due to your circumstance additional advice or work is advisable, we will always confirm the full details and cost of such upfront for your consideration.

- ✓ 30 minute telephone consultation to gather detailed information
- ✓ 90 minute appointment to check and explain draft documents
- ✓ 60 minute appointment to sign and attest documents
- ✓ Home visit or meeting at workplace (or you can visit our office)
- ✓ Provision for up to five gifts of money or personal effects
- ✓ Provision for funeral wishes including organ donation
- ✓ Provision for care of pets
- ✓ Trusts for minors (including bereaved minor trusts & 18-25 trusts)
- ✓ Copy of will(s) and full commentary explaining will(s)
- ✓ Lifetime record of all insurance arrangements
- ✓ Full review of insurance arrangements & insurance trusts

Enhanced Will Packages

For clients who want to do more to protect their families and assets, below are some popular combinations of services at discounted rates (the fees quoted are in addition to the cost of a standard will, although for those under the age of 65 a standard will is free of charge).

Property Protection Wills

£349

Couples who own property jointly (with or without a mortgage) and want it to pass to their children often choose this package.

- ✓ 2x Property protection trusts (bespoke life interest trusts)
 - ✓ Severance of joint tenancy (if applicable)
 - ✓ Title search
- Total saving £218*

Property Protection Wills & Powers of Attorney

£799

This package is very popular with couples who have children that they want to benefit from the family home, particularly where the property is mortgaged. Importantly it also contains full powers of attorney to make life easier for the family should the worst happen.

- ✓ 2x Property protection trusts (bespoke life interest trusts)
 - ✓ Severance of joint tenancy (if applicable)
 - ✓ Title search
 - ✓ LPA's Property and Financial Decisions
 - ✓ LPA's Health Decisions
 - ✓ LPA Certificates
- Total saving £684*

Complete Estate Protection Package

£1,999/£2,599

This package is for couples and single clients alike who want to protect their estate for future generations (only available where the family home is mortgage free).

- ✓ Home protection trust(s) (bespoke lifetime discretionary trust)
 - ✓ Severance of joint tenancy (if applicable)
 - ✓ Letter(s) of wishes
 - ✓ LPA(s) Property and Financial Decisions
 - ✓ LPA(s) Health Decisions
 - ✓ LPA Certificates
 - ✓ Discretionary will trust(s)
- Total saving £2,673*

Wills & Powers of Attorney

£349/£599

Making a will solves many problems, but without powers of attorney your family may encounter many other problems.

- ✓ LPA(s) Property and Financial Decisions
 - ✓ LPA(s) Health Decisions
 - ✓ LPA Certificates
- Total saving £317*

Fees are inclusive of VAT, the figure on the left is for a single client, the figure on the right is for a couple (single person → £ X /£ Y ← couple)

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 * Fees marked with an asterisk apply when undertaken at the same time as a Last Will & Testament

Will Related

- **Will Storage & Free Updates** £29/£39
 (Annual fee for the storage of wills. Includes free updates and registration on the national will register, usually £30 per will)
- **Codicil** £99/£139
 (A document that amends, rather than replaces, a previously executed Will – the addition of a gift for example)
- **Will Updates** £99/£139
 (The production and attestation of a new Will based on a previously drafted document with any number of alterations)

Powers of Attorney

- **LPA Health Decisions** *£199/£349 £229/£409
 (A legal document appointing ‘attorneys’ to make decisions on your behalf regarding your Health & Welfare in the event of incapacity)
- **LPA Property Decisions** *£199/£349 £229/£409
 (A legal document appointing ‘attorneys’ to make decisions on your behalf regarding your Property and Financial Affairs)
- **LPA Registration** £79/£99
 (The process of registering a LPA with the Office of the Public Guardian. LPA’s must be registered before attorneys can act)
- **General Power of Attorney** £99/£139
 (The appointment of ‘attorneys’ to make financial decisions on your behalf. Only whilst you have mental capacity)

Property Related

- **Severance of Joint Tenancy** £99
 (Changes joint ownership of property to enable the owners to gift their respective shares of the property by deed of trust or Will)
- **Transfer of Equity** £399
 (The addition or removal of trustees to the legal title of a property, possible only on an un-encumbered property)
- **Conveyancing** £499+
 (The transfer of legal title of property from one person to another. The fee is exclusive of disbursements)
- **Advice on Declarations of Trust** £299
 (A statement by the owner of an asset, declaring the underlying interests of the persons for whose benefit he holds the legal title)
- **Option to Purchase** £59/£84
 (An agreement between parties that gives one party the option to purchase property, goods and/or land from another)

Trusts

- **Right of Occupation Trust** *£199/£279 £229/£329
 (A trust that passes property to beneficiaries but allows someone to occupy the property in the meanwhile)
- **Life Interest Trust** *£199/£279 £229/£329
 (A trust that ultimately passes assets to beneficiaries but provides someone else an interest in the meanwhile)
- **Discretionary Trust** *£149/£199 £179/£229
 (A trust that allows trustees to decide who of a group of beneficiaries inherit, when, and how much. Fee includes expression of wishes)
- **Disabled Persons Trust** *£199/£279 £229/£329
 (A trust drafted into a Will that places money left to a disabled beneficiary in the care of trustees)
- **NRB Discretionary Trust** *£249/£349 £299/£409
 (A trust enabling unmarried couples to enable the survivor to use their partners Inheritance Tax allowance)
- **Home Protection Trust** *£1699/£2299 £1999/£2699
 (A trust designed to protect your home against various risks including future changes in your beneficiaries circumstances)
- **‘Double-Dip’ Wills & Trust** £999
 (A will that takes full advantage of BPR (Business Property Relief) in relation to Inheritance Tax)

Miscellaneous

- **Advance Directive / Living Will** £99/£139
 (A document stating what treatment is to be refused or continued in a situation where you do not have capacity)
- **Non Provision Declaration** £99
 (A letter detailing the reasons for excluding persons to be read to Court in defence of a claim against an estate)
- **Expression of Wishes** £79/£109
 (A non-binding document sharing personal thoughts and perspectives with those who will be serving as trustees)
- **Pre-Paid Funeral Plans** £2,800+
 (A way to pay for your funeral director’s services in advance without the worry of future cost increases)
- **Probate Services** Variable
 (The processes involved with estate administration post death, including obtaining the Grant of Probate itself)
- **Cross Option Agreement** £299
 (A ‘Call’ option for surviving owners of a business to buy a deceased owner’s share and a ‘Put’ option for the PR’s of the deceased owner)