



What does our fixed Standard Administration fee include?

In many cases, relatives find it difficult to administer a loved one's estate themselves. This is not only because of the emotional factors, but also because of the time it takes and the complexities involved. The Probate Bureau offers a fixed fee Probate Administration service to help in these cases.

Our fixed fee Standard Administration service includes the following steps as and where appropriate:

1. A complimentary initial meeting at your home to determine the full situation and to provide advice on the next steps.
2. Clients are assigned a dedicated Probate Administrator to handle the estate from start to finish. They are available on the telephone or via email and will provide you with regular written updates.
3. Full assessment of estate assets prior to start of the Probate administration process.
4. If the original Will and accompanying documents (e.g. a Codicil) are held by a third party such as a firm of solicitors then the release of such documents will be secured upon your signing an authorisation settled by ourselves.
5. Scrutiny of the original Will (if applicable) for any obvious or contextual discrepancies.
6. Original documentation such as the Will or Deeds are stored in our onsite, fireproof safe-store facility.
7. Prompt payment of the funeral director's invoice from an appropriate account held by the Deceased if not already dealt with.
8. Registration of the death with the Mailing Preference Service to prevent unsolicited mail.
9. Verification of family tree in simple intestacy cases (where no Will is present) where the identity and addresses of the beneficiaries are known.
10. Preliminary correspondence with the following institutions to notify of death, freeze accounts and to obtain probate valuations:
 - Banks & Building Societies
 - Post Office
 - Equity Release Companies
 - Financial institutions in respect of Investment Bonds, Unit Trusts, ISAs etc.
 - Share Registrars
 - Pension Companies and The Department of Works & Pensions (DWP)
 - Utility Companies
 - Mortgage Companies
 - NS&I
 - The Benefits Agency
 - Credit & Store Card Companies
 - Life Assurance Companies
 - Personal Insurances - Property, Car, Travel, Health etc.
 - Passport
 - Driving Licence
 - Memberships/ Catalogues / Subscriptions
 - Disabled Badge
11. Notification of the death to Her Majesty's Revenue & Customs (HMRC) to clarify Income Tax position up to date of death.

12. Preparation of authority document for next of kin or Executor to sign appointing Director/s of The Probate Bureau to act in the administration of the estate (Power of Attorney).
13. Arranging professional open market valuation of deceased's property as at date of death, if applicable.
14. Your Probate Administrator will carry out background research on properties sold in the local area to obtain an approximate valuation as at date of death.
15. Once all valuations have been obtained, the gross and net estate is assessed to determine which IHT forms are necessary for filing in support of the application for the Grant of Representation.
16. Creating a schedule of assets and liabilities for submission.
17. Completion of the necessary probate application forms.
18. Where Inheritance Tax is payable your Administrator will:
 - i. Obtain a Inheritance Tax reference number (ITRN)
 - ii. Arrange payment of Inheritance Tax from deceased's account/s using applicable forms
 - iii. If no liquid assets are available, the Executor (or next of kin if intestate) will be advised of how to obtain necessary funding
19. Preparation of Oath
20. Arrange swearing of Oath
21. Submission of the application to the District Probate Registry
22. Receipt of the Grant of Representation
23. Proof read original Grant of Representation
24. Submission of the S27 Trustees Act legal notice to creditors for publication in the London Gazette
25. Arranging the sale or transfer of property with the conveyancing solicitor
26. Sending original Court sealed copies of the Grant of Representation and necessary withdrawal forms to relevant companies for registration and release of funds.
27. Completion of Estate Information Return for HMRC and adjustment accounts as required
28. If shareholdings are not sold via the Registrar, your Administrator will arrange the sale through a private stockbroker.
29. Receipt of estate funds and payment into Estate Client Account
30. Payment of estate liabilities and reimbursement of estate expenses
31. Payment of pecuniary legacies
32. Finalisation of utility accounts, council tax and buildings insurance.
33. Calculation and payment of Capital Gains Tax, where necessary
34. Review of estate files to ensure the following are all completed:
 - i. Identification for beneficiaries in place
 - ii. Bankruptcy searches carried out
 - iii. Outstanding assets of the estate called in
 - iv. All debts confirmed as finalised
35. Preparation of the Estate's final account to inclusive of full client account ledger of all credit and debit entries with supporting documents thereto
36. Final payments to the residuary beneficiaries in full with duplicate copies of the Estate account provided
37. Returning residual documents such as original Death Certificates to the instructing client
 - Please note that the above are the measures that need to be undertaken in the administration of an estate where no unforeseen problems or complexities arise. Occasionally, the unpredictable can happen and in these instances

where extra work beyond the expected has to be undertaken then additional charges will be levied in accordance with Clause 2.3 of our Terms and Conditions.