

# Help is at hand when you lose a loved one

Let us assist you to make the probate  
process as smooth as possible





# Probate

Probate is the process of administering a deceased's estate. This involves listing their assets and making sure these are distributed in accordance with their wishes. It also means paying any taxes which are due.

After a loved one passes away we understand that trying to deal with paperwork can sometimes be overwhelming.

As your accountants, we have spent years developing an understanding of your financial affairs, business objectives and most importantly personal goals. We are therefore in a good position to help administer your estate.

As licensed practitioners for probate, we can assist client's through the whole process. We can either obtain probate for you or we can assist your executors to make the application. We can also prepare your inheritance tax account, ensuring that all available reliefs are claimed to mitigate your tax and to ensure that as much of your wealth goes to the people that matter to you.

## Working together

Traditionally this work would have been administered by a solicitor however due to a change in legislation accountants can now be licensed to undertake such work. As an adviser for both clients' business and personal requirements we already have a full understanding of your affairs making this process as seamless as possible.





# Process

Our knowledge of your financial affairs gives us great insight into making the process more efficient.

We are able to tailor our probate services to ensure that the best service is provided. Each estate is unique but in general, the following issues need to be addressed:

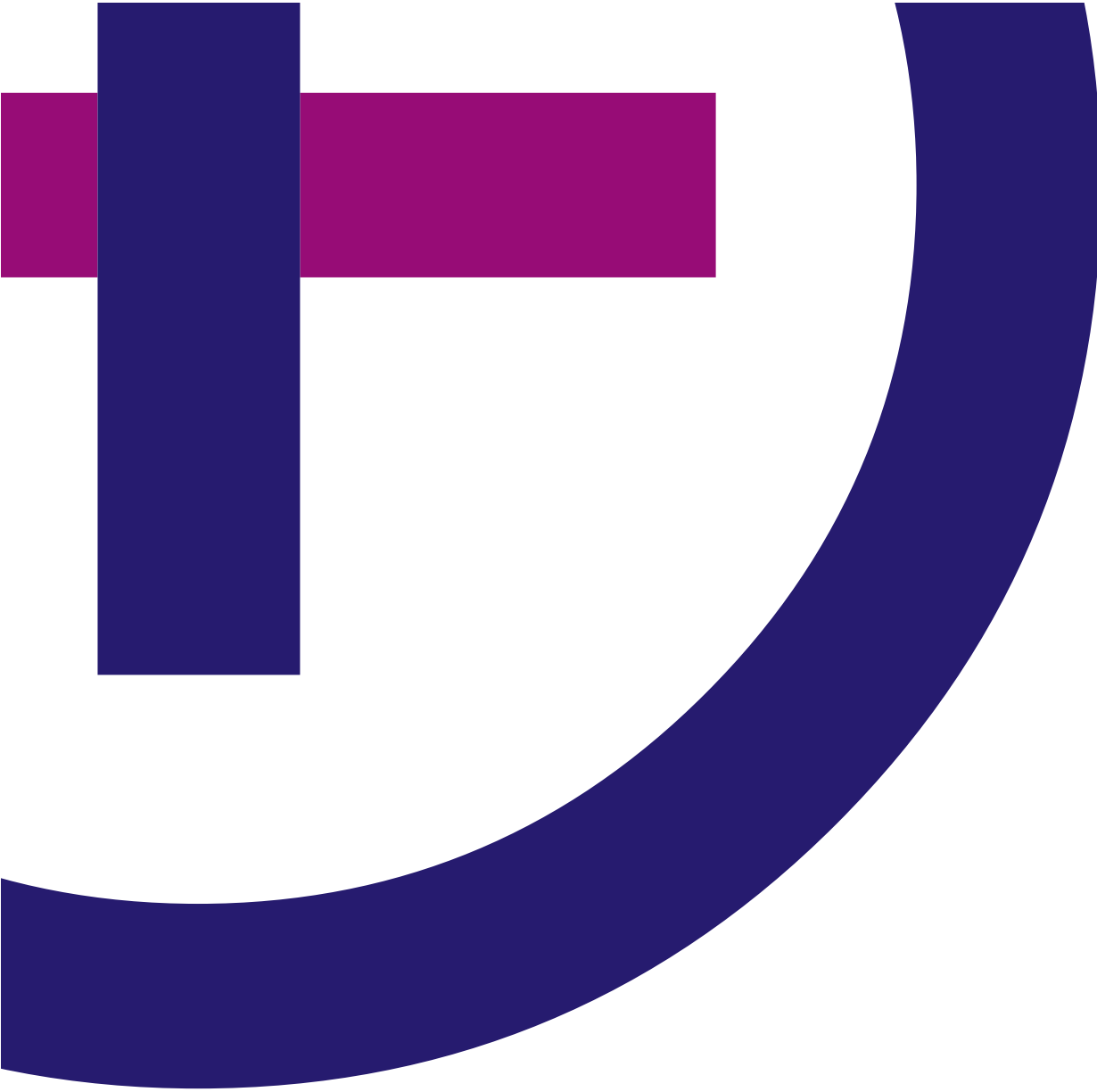
Examples of the steps involved are as follows:

- A summary of the deceased's assets and liabilities at the date of death must be prepared before an application for a Grant of Probate or Letters of Administration can be made
- If a deed of variation is appropriate we can advise on this.
- We will calculate any IHT due on the estate
- When probate has been granted we can administer the estate and ensure that liabilities and payments to beneficiaries are made under the terms of the will

Our fees for this service are charged at an hourly rate and following a free consultation we would be able to advise an estimation of how many hours the work would warrant based on the complexity of the affairs.

**After their passing we ensure their wishes are met and support loved ones through the probate service.**

**Contact us today to see how we can help**



**+** Listen  
**Advise**  

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**Prosper**