



## ESTATE ADMINISTRATION

### 1. CHARGES

Our charges are based on the time spent dealing with a matter. Time spent will include meetings with you and perhaps others; considering preparing and working on papers; correspondence; and making and receiving telephone calls.

We will charge you at the following hourly rates for each hour of work (depending on who deals with the matter) from now until the review date on 1<sup>st</sup> August next. Routine letters and routine telephone calls made and received will be charged in units of 1/10<sup>th</sup> of an hour. Other letters and calls will be charged for on a time basis:

Principals - £280; Solicitors with over 10 years experience £250; Other Solicitors - £240; Legal Executives - £200; Legal Assistant (Non-qualified) - £180; Trainee Solicitors - £160.

On 1<sup>st</sup> August in each year the hourly rate will be reviewed and we will notify you in writing of any increased rate.

We will add expenses and VAT to our charge at the rate that applies when the work is done.

We will review with you the estimate of the total charges after the Grant of Probate has been obtained or every six months. Our charges will not exceed the estimate unless we have first discussed this with you and we have confirmed the revised estimate in writing.

### 2. BILLS

We will send you a bill for our charges and expenses after the Grant of Probate has been obtained and every six months thereafter during the administration of the estate.

We will also send you a final bill for our charges and expenses when the administration of the estate is completed. If we hold sufficient funds on your behalf and we have sent you a bill, we will usually deduct our charges from these funds.

Payment is due to us within 28 days of our sending a bill to you. If you do not pay within this time, we will charge interest on it at 10% per year on a daily basis from the date of the bill.

If you have any query about your bill, you should contact the person dealing with your matter straight away.

### **3. ADDITIONAL EXPENSES**

Other expenses will be necessary in dealing with the estate. These will include:

- (a) Probate Registry Fees
- (b) Commissioner's Fees
- (c) Valuation Fees
- (d) Accountants Fees (where appropriate)

### **4. STAFF**

The Principal with ultimate responsibility for this matter is Jennifer Brewer. It will be handled on a day to day basis by a solicitor / a legal executive / a trainee solicitor. If any difficulty should arise, please raise the matter first with him/her. Should you still be unhappy with the situation please refer the matter to Jennifer Brewer who will investigate and contact you.

### **5. HANDLING THE ADMINISTRATION**

As explained more fully in our leaflet "The Personal Representative's Guide", unless the estate is very small and with no freehold or leasehold property, the PRs will have to obtain a grant of representation from the Probate Registry showing their entitlement to deal with the estate. We will tell you if a grant is needed, and we will handle all the necessary paperwork.

If a Will was left, this should set out who is to inherit the estate. If there was no Will, the law sets out who is entitled to inherit and we should be able to tell you at a very early stage which members of the family are entitled to the estate and in what proportions and shares.

### **6. FIRST STEPS**

The first stage of our work is to prepare the papers for the application for the grant. We try to complete this promptly. This should be done within 14 to 28 days. We will also tell you when we expect to receive the documents from the Probate Registry.

We usually write to all the beneficiaries named in the Will, or to those family members entitled on an intestacy, to tell them of their legacies and entitlements. When writing, we also try to indicate when we expect to be able to make payment.

We will arrange for payment of the funeral account and other bills in due course. Please therefore send the funeral and other accounts to us.

## **7. INHERITANCE TAX**

We do our best to tell you as quickly as possible whether or not there is likely to be any inheritance tax (IHT) to pay, and if so, advise on how the tax is to be paid. We shall deal with this when we write to you about obtaining the grant.

It may be helpful to have some very general guidance on IHT. None is payable where the value of the net estate is less than £325,000. Above this, IHT is payable at the rate of 40% on the net value of the estate. There is no tax at all on property going to the spouse or to a charity.

If you have any questions or difficulties at any time, do not hesitate to get in touch with us.

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