

**Jackson Longe**  
**Solicitors**  
**Private Client Department**  
**Fee Guide**



[www.jacksonloonge.com](http://www.jacksonloonge.com)

**(a) Wills**

**Single Wills** from £295  
**Pair of Mirror Wills** from £405.00

**(b) Protective Trust / Discretionary Trust**

**Single Protective Trust Wills** from £395.00  
**Pair of Protective Trust Wills** from £595.00  
**Single Discretionary Trust Wills** from £500.00  
**Pair of Discretionary Trust Wills** from £925.00

**(c) Lasting Power of Attorney**

**Single LPA** £325.00 plus VAT  
**Pair of LPAs** £575.00 plus VAT

**(d) Severance of Joint Tenancy**

**Standard fee for severing joint tenancy** £375.00

**(e) Secure Document Storage**

**Document Storage Annual Fee** £10.00  
(\*under review as we do not charge at all at the moment)

**(f) Probate -Extracting Grant of Representation  
Only**

**Fixed Fee** from £1,250.00 plus VAT  
**Hourly Rate** from £310.00 plus VAT

**All of our fees are subject to VAT**

(g) Probate –Administration of Estate  
Fixed Rate 1%-2.5% of the gross value of the estate  
Hourly Rate from £310.00 plus VAT

These fees are not inclusive of referral fees which may be inclusive or exclusive depending on the terms agreed with respective referrers.

### Our Hourly Rate

Generally, our fees are based mainly on the time spent by the fee earner and staff acting for our clients.

This includes time spent on interviews; drafting of documents; reading and research; preparing and working on papers and correspondence; telephone calls; and any time spent travelling or waiting while on clients' business.

The time spent is measured, and we apply a minimum unit of six minutes to each task. Time recorded is costed according to a formula, which gives a charging rate or cost per hour for undertaking work on clients' behalf, according to the level of fee-earner allocated to the client matter.

Our firm's hourly rates are as follows:

- Managing Solicitor- £310.00 per hour
- Senior Solicitor - £255.00 per hour
  - Solicitor - £195 per hour
  - Paralegal - £105.00 per hour

We will give a written estimate of the probable cost of the transaction and also of all disbursements which we can reasonably foresee at the start of the transaction.

We will notify you in writing if for any reason we feel it necessary to vary that estimate and will explain to you why we need to do so.

# PROBATE AND ESTATE ADMINISTRATION FEE GUIDE

**Our team and basis of charging:**

**Our team offers a wealth of experience in delivering high quality work in all matters relating to estate administration. Our probate and estate administration services are tailored to meet your needs.**

**Our charges are typically based on the time spent dealing with the matter and we will only charge a percentage or value element OR a fixed fee where the scope of work required can be ascertained and agreed.**

**Our team's hourly rates are as follows:**

**Managing Partner £310**

**Senior Solicitor £255**

**Solicitor £195**

**Trainee Solicitor/Paralegal £105**

**The exact cost will depend on the work we are asked to do and the individual circumstances of the matter. For example, if there is one beneficiary and no property, costs will be at the lower end of the range. If there are multiple beneficiaries, several properties, foreign assets and multiple bank accounts, costs will be at the higher end.**

**We can help you through this difficult process by obtaining the grant of representation (probate). We will also undertake the collecting and distributing the assets.**

**In addition to our fees there will be disbursements, which are expenses, payable to third parties, related to your matter such as court fees, land registry charges etc. We handle the payment of the disbursements on your behalf to ensure a smooth process.**

**It is not possible to set out the costs involved in dealing with every possible matter that might arise during the administration of an estate. Some matters are specifically excluded from the costs information provided below.**

**For more information about what is not included please see below under "What is not included?".**

We provide two levels of service:

1. Applying for grant of representation only

If the Executors are able to deal with the estate themselves (i.e. obtaining probate valuations, collecting in all the assets, paying the liabilities and then distributing the estate, we can assist with the legal formalities of obtaining the Grant of Representation, allowing the Executors to deal with the remainder of the administration themselves.

The fees below typically include time spent advising on the terms of the Will, the executors' duties and calculating the Inheritance Tax (IHT) where appropriate, preparing the IHT tax returns, drafting the Oath, dealing with any settling of documents at the probate registry, filing section 27 (of the Trustee Act 1925) notices and ultimately extracting the Grant of Representation from the probate registry.

Applying for the grant will usually involve between 10 and 20 hours work and our fees will range from between £1,250 and £6,500 depending on the status of the person handling the matter, plus VAT.

As part of our fee we will:

- Provide you with a dedicated and experienced probate lawyer to work on your matter.
- Identify the legally appointed executors/administrators and beneficiaries.
- Accurately identify the type of probate application required for the estate in question.
- Obtain the relevant documents required to make the application.
- Draft the Executor/Administrator's Oath for the Court to approve (if required)
- Complete the grant of representation application and the relevant HMRC (tax) forms.
- Make the application to the Probate Registry (HMCTS) on your behalf.
- Obtain the grant of representation and securely send the original and sealed copies to you for use.

## 2. Dealing with the entire administration

For a more complex estate, the Executors may wish to instruct us to deal with the entire estate. Please refer to the information note below setting out the typical stages in the administering of an estate here in England and Wales.

Upon instructions, we will review the matter and provide you with costs estimates based on the time estimated to be spent on dealing with the entirety of the estate administration. We attempt to provide a cost estimate range at the outset but this is based entirely on information that we have at that time and so can change during the course of the administration. We will of course communicate such changes to you in good time to allow you decide how you wish to progress the matter.

Our service in this regard typically include collating all the information about the assets and liabilities in the estate, securing any property, identifying & advising beneficiaries, dealing with personal chattels, liaising with relevant third parties, dealing with all aspects of the Inheritance Tax liability including filing returns and settling any tax debt, applying for the grant, encashing the assets in the estate, distribution of assets and estate accounts. This is dealt with purely on a time spent basis using the hourly rates set out above. Once we have the information to obtain the Grant of Representation, we review the costs and advise the beneficiaries of the potential costs to complete the estate.

Our fees range from between £3,100 (plus VAT) for a simple estate worth in the region of £325,000 with one beneficiary to fees that would start from £25,000 (plus VAT) for estates involving assets worth over £1 million with several beneficiaries, investments, portfolios and properties.

When we first meet with you, we will obtain information about the estate that will enable us to give you a tailored fee estimate that takes account of all the factors. As the matter progresses, we provide updated costs information and monitor the costs throughout.

As part of our fee  
we will:

- Provide you with a dedicated and experienced probate lawyer to work on your matter.
- Identify the legally appointed executors or administrators and beneficiaries.
- Accurately identify the type of probate application you will require.
- Obtain the relevant documents required to make the application.
- Complete the grant of representation application and the relevant HMRC (tax) forms.
- Draft the Executor/Administrator's Oath for the Court to approve (if required)
- Make the application to Probate Court (HMCTS) on your behalf.
- Obtain the grant of representation and securely send copies to you.
- Collect and distribute all assets in the estate.
- Prepare the Estate Accounts.
- Obtain clearance from HMRC for inheritance tax, income tax and capital gains tax acting with a chartered tax adviser or your accountant (who will charge their own fees).

Where our firm has been appointed as the professional Executors, we will typically deal with everything associated with the estate until it can be distributed.

## “What is not included?”

The costs information provided above does not include:

### Service Level 1 Fee:

does not include preparation of Income/Capital Gains Tax Returns, collection of assets, distribution of assets or preparation of estate accounts, advice on any Trusts contained within the Will, deeds of variation, sale of property or foreign assets.

### Service Level 2 Fee:

does not include estates where there is a dispute (see below), where business assets, agricultural property, foreign assets, ongoing trusts or charitable beneficiaries are involved.

If there is a property, the above fees do not include the fees for dealing with any sale of that property. Our property team can provide you with an estimate of their fees.

## Disbursements

In addition to our fees plus VAT, the likely disbursements/expenses include:

- Court Fee for Grant of Representation application  
£155
- Copies of Sealed Grant  
£0.50 per copy
- Copy Death Certificate  
£11.00 per copy
- Bankruptcy Search Fee  
£3.00 per UK beneficiary  
from £75.00 per foreign beneficiary
- Trustee Act Notice Fee  
£250.00
- Land Registry Title Register Fee.  
£3.00 per title.

Property and investment valuation fees may also be necessary, but it is not possible to provide a realistic guide as to how much these will be as they will depend on the assets involved. We will provide details of such fees before they are incurred and only in agreement with you.

## How will long will the work take?

On average, to fully administer an estate takes between 8 to 20 months.

Typically, obtaining the Grant of Representation takes 3 - 6 months and collecting assets and preparing the estate accounts then follows, which can take between 6 - 8 weeks. Once this has been done, we can distribute the asset, which normally takes 4-6 weeks.

However, it is important to note that this depends on how complex the estate is and how quickly other parties involved deal with the matter. Complexity may arise from family dynamics, missing beneficiaries, missing assets, unclear instructions etc.

## Disputed Estates

The information we provide above does not cover any “contentious” element to the estate, i.e. where something is disputed. A dispute may arise for example, where someone seeks to challenge the Will or bring a claim under the Inheritance (Provision for Family and Dependents) Act 1975 or where an issue arises in relation to a particular asset in the estate. Proceedings do not have to be issued for the matter to become contentious.

In these circumstances we will provide details of the likely costs and disbursements involved in dealing with the contentious/disputed aspect of the matter.



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