

# Price and Service Information for Wills, Trusts & Probate

## Probate and Estate Administration Work

At Bird and Lovibond Solicitors we pride ourselves on our solicitors' down to earth, friendly, compassionate and pragmatic approach. We receive the vast amount of our Probate work through recommendations from previous clients. Excellent client care and Service is our upmost priority. Your matter will be handled from start to finish by either a Director of our firm or a qualified Solicitor or Legal Executive (not an unqualified person, supervised by someone else) designated to your case.

Probate matters can vary greatly in terms of the size and extent of the estate and issues involved. Some matters may only have one Executor and one beneficiary for example and there may be no Inheritance tax to pay, whilst another may involve the Directors of our firm as Executors with multiple beneficiaries and multiple properties to sell and a significant tax liability. It is therefore important at the outset that we meet with you and assess the size of the estate as best we can and discuss with you which of the following charging structures are appropriate for your individual case. To enable us to do this, we offer an initial meeting of up to 45 minutes charged at a fixed fee of £150 plus VAT. If you decide to proceed with our firm, then payment of this fee can usually be delayed until an interim bill is raised during the progress of your matter. If you decide not proceed, then this fee is payable at the meeting. We will then follow up the meeting, by sending out our client care letter, charging information and a cost estimate, so that our clients are aware of what their matter is likely to cost.

## Three Charging options for Probate matters

1. Our most commonly used charging structure is based on the Law Society's Guide for charging in non-contentious matters and takes into account complexity, skill, documents required, risk factors and the expenses incurred which are normally reflected in an hourly rate.

Charges for non-contentious probate work are therefore most often based on a part-time and part-value basis.

### Value Element

In line with the Law Society guidelines, therefore, in probate matters where a Director of Bird and Lovibond Solicitors is an executor, the following percentages are applied:

- Gross value of main residence: 0.75%
- Gross value of the rest of the estate 1.5%

In all other cases:

- Gross value of main residence: 0.5%
- Gross value of the rest of the estate 1%
- 

\*VAT is charged on the value element at relevant rate - currently 20%

### Time element

In order to take account of this value factor, our firm's hourly charging rates are reduced ( in the left hand column below) and currently stand as follows (from June 2026):

|                                                                 | <b>With value factor</b> | <b>Without value factor</b> |
|-----------------------------------------------------------------|--------------------------|-----------------------------|
| Directors (Michelle Everest, Amandip Dhaliwal & Kylie Kallay)   | £300 (plus VAT)          | £350 (plus VAT)             |
| Senior Solicitors                                               | £275 (plus VAT)          | £300 VAT)                   |
| CILEX Legal Executive/Solicitors/STEP Qualified<br>(Kiran Sami) | £260 (plus VAT)          | £290 (plus VAT)             |
| Trainee Solicitors                                              | £150 (plus VAT)          | £170 (plus VAT)             |

## **2. Hourly charging rate only**

In certain cases, particularly where there is a high level of complexity, but relatively low value estate or in cases where the client only wants our firm to undertake smaller discreet elements of work - we would generally charge purely on a time-spent basis in which case the fees will be based on the figures shown in the right-hand column.

## **3. Fixed Value percentage of the estate only (not time factored)**

In limited circumstances and depending on the extent of the work required and size and complexity of the estate, we can discuss with you, if appropriate, at our initial meeting, a fixed fee arrangement based on a flat percentage of the total gross value of the estate for example 2% plus vat.

**The fees referred to in this section include the following services:**

- Identifying the Executors or Administrators and Beneficiaries
- Ascertaining the extent of the assets and liabilities
- Advising on protection and insurance of assets post-death

- Completing the relevant IHT forms and advising on potential reliefs available
- Preparing application for Probate including calculation of Inheritance Tax
- Liaising with asset holders
- Obtaining Grant of Probate and completing all tax formalities with HMRC
- Day to day administration of the estate
- Gathering in assets and arranging disposals where necessary
- Preparing, agreeing and distributing full estate accounts
- Paying legacies and distributing net estate to beneficiaries
- Advising executors regarding potential claims

### **Disbursements (Third party expenses)**

Disbursements are costs related to your matter that are payable to third parties. We handle the payment of the disbursements on your behalf. Your solicitor will always notify you before they incur significant disbursement costs.

### **Examples include:-**

- HMCTS application fee – £300.00 up to 12.7.26 and then increasing from 13.7.26 to £526 plus £16 per Grant copy.
- Land Registry Office Copy Entry fees – £7.00 plus VAT.
- Land Registry fees – dependant on action and value needed.
- Trustee Act Notice for potential creditors from £200-400 plus vat.
- Share valuations depending on size of share holding TBA
- Accountant's fees sometimes required to calculate capital gains and income tax liability of the estate
- AML searches with estate search against Executor/Deceased/beneficiaries approx. £7-15 per search

### **Likely Timescales**

Typically, it takes between 6-24 months to obtain a grant of probate and administer an estate. The length of time is dependent on a number of factors, the complexity, size and extent of the assets, tax issues involved, number and whereabouts of beneficiaries etc. Sometimes it can take several years in larger, more complex estates. We will always keep executors updated and advise if any complicating factors arise.

### **Will Writing Services**

For a basic, single, straight forward non-complex will with no 'trusts' issues we usually charge £300 plus VAT. For 'couples' straight forward wills with no 'trusts' issues, we usually charge a reduced fee of £495 plus VAT. For complex, lengthy wills or wills containing 'trusts' we will provide you with an individual fixed fee quote at our initial meeting with you, for your approval. Codicils usually cost £175 plus VAT if simple.

**Disbursements (expenses)**

We recommend that all wills are logged on the 'certainty database' which costs £10 plus VAT.

**Lasting Powers of Attorney**

We are able to undertake Lasting Powers of Attorney's for Health and Welfare and Property and Financial affairs for an individual. Our basic charge is £395 plus VAT, per LPA. For both the above LPA's the cost will be £690 plus VAT.

For couples undertaking LPA's at the same time, the second person's LPA will be charged at a discount of £100 per LPA.

**Disbursements (expenses)**

There is a fee payable to the Office of the public Guardian - currently in the sum of £92 per LPA.

**Deputyship Application for Property and Financial Affairs**

We are also able to undertake deputyship applications for Property and financial affairs where a family member needs to make an application to the Court of Protection on behalf of a loved one, who has lost mental capacity and no Lasting Power of attorney is in place.

Our charges for this will usually be based on our hourly rate, based on time spent, in accordance with the hourly charging rates quoted in the right hand column of the table above (without value factor).

