



BUCKINGHAM GATE

ASSISTED PROBATE SERVICE

At Buckingham Gate, through years of working with families coping with the loss of a loved one, we know how frustrating the probate process can be. It can be hard dealing with financial providers, HMRC and legal processes at the best of times, let alone when you are grieving.

That's why we developed the Buckingham Gate Assisted Probate Service, providing the best support and expertise the whole way through the estate administration process.

The Buckingham Gate Assisted Probate Service includes:

- Location of all financial accounts and provision of 'date of death' valuations.
- Preparation of estate income account.
- Preparation of estate capital account.
- Preparation of the IHT 400 estate account and all of the associated forms.
- Claims for any discounts on property values and liaising with HMRC to agree the most competitive value.
- Claims for all possible reliefs and exemptions and preparation of gifting schedules to support the claim.
- Claims for all available nil rate band and transferable nil rate band allowances.
- Claims for all available residence nil rate band allowances.
- Claims for any gifts made in the 7 years prior to death and investigations to establish historic gifting.
- Advice on the final tax efficient distribution of the estate.
- The placing of Section 27 notices under the Trustee Act 1925.
- Comprehensive 'Estate Search' reports to track and locate potential lost or unknown accounts.

We operate a very simple, fixed-fee charging structure for the Assisted Probate Service, with no nasty surprises along the way:

Simple Estate	Standard Estate	Complex Estate
This is an estate worth under £650,000 and where assets are simply passing to the surviving spouse	This is an estate worth between £650,000 and £2m or where assets are passing to beneficiaries other than the surviving spouse	This is an estate worth over £2m or an estate with any overseas elements
£12,995	£19,995	£25,995

What's not included:

- The preparation of a deed of variation.
- More complex trust structures to protect the estate from inheritance tax.
- Property work such as conveyancing.
- Preparation of annual income tax returns of the deceased.
- Contentious probate issues or any additional work involved because of HMRC investigations into the estate
- Trust fulfilment and any associated property work.

We will always let you know if any additional charges arise and will always obtain your agreement before incurring additional costs on your behalf. We will do our best to let you know of any foreseen additional costs at the beginning of the process.