

## Summary of services

Services included in your fixed price

**Applying for probate or confirmation** - all documentation required for the application for grant of representation (confirmation in Scotland)

**Inheritance Tax** - completing all Inheritance Tax forms and arranging payment of Inheritance Tax

**Income Tax work (R27/SATR) for the year of death** - any Income Tax affairs (including self-assessment if required) for the tax year of death

**Setting up Trusts in a Will** - we will set up and formalise any Trust in the Will. We will not act as an ongoing trustee but we can recommend professional replacements. Any work required in relation to lifetime Trusts or Trusts from a predeceased spouse's estate is an additional service.

**Instrument of variation** - we will prepare an instrument of variation if required

**24/7 online case tracking** - through our client portal, Insight

**Dedicated point of contact** - one of our specialist staff will be your main point of contact throughout the process and they will be supported by our team of experts

**Property sales** - we will liaise with third parties as required (such as estate agents and conveyancers) to ensure a swift and efficient sale. We use recommended property management specialists to undertake this work for you, or will liaise with providers of your choice

**Registration and transfer of property** - we will transfer property to beneficiaries and register property at the Land Registry (excluding Land Registry fees and costs associated with a property sale)

**Utilities** - cancelling or transferring any utilities associated with the deceased's property

**Producing estate accounts** - we will send these to our client and residuary beneficiaries

**Rehoming pets** - we can arrange for a pet to be re-homed

Third party costs included in your fixed price

**Grant / confirmation fee** - the fee charged to obtain the grant of representation (England and Wales) or confirmation (Scotland) is set by the government. The grant fee (England and Wales) is currently set at £155 when obtained by a legal professional. Any changes to the fees are outside our control and will be passed on to you.

**Specialist buildings insurance (12 months)** - we will arrange and pay for insurance for any property (excluding business property) associated with the estate. If insurance is required after 12 months, there will be an additional charge.

**Open market property valuation** - valuation by a qualified professional (excluding RICS valuations)

**Postal redirection** - we will arrange and pay for the redirection of post through Royal Mail for six months.

**Affidavits or statutory declarations** - we will pay any associated costs

**Transferring funds to beneficiaries** - we will pay any bank fees as required for transferring money to beneficiaries

Additional services we can arrange as required

**Property sale** - we work with leading property sale specialists who can arrange to sell any property included within the estate. This service is offered at exclusively discounted rates for our customers. We will arrange for one of them to contact you to arrange a valuation of your property for probate/tax purposes.

**Land Registry fees** - for properties to be transferred to beneficiaries

**Additional Income Tax work** - for any number of years prior to death

**Bond of caution** - a compulsory insurance policy for Scottish domiciles with intestate estates

**Chattel valuations** - third party valuations of furniture and possessions for estates subject to Inheritance Tax

**Missing beneficiaries** - people-tracing services if there are missing or unknown beneficiaries

**Overseas asset repatriation** - selling assets such as property and accounts and moving funds to your home country

**RICS valuations** - a chartered surveyor's valuation of the property for estates subject to Inheritance Tax

**Share indemnities** - required where the deceased held shares but the certificate cannot be located

**Trusts** - ongoing management of trusts

**Valuation and administration of businesses and agricultural property** - valuations are required for estates subject to Inheritance Tax

The additional services above are not included in your fixed price. We can provide quotes for these services as required. You are under no obligation to use Kings Court Trust or our trusted partners for these services.