Latimer Hinks SOLICITORS

Private Client
Guidance on cost

Our expertise

We believe the approach we take and the legal services we provide to our clients are different from that of other firms. We care passionately about what we do, and we go the extra mile delivering the right support when you need it. It's an approach we have taken for over 130 years in all areas of our business.

The depth of our knowledge and expertise means that not only are we very comfortable advising clients with straightforward estates, but we can also handle highly complex matters. We have a reputation for maintaining a high standard of service for our clients and, regardless of the nature and extent of the value of the estate, we ensure our clients receive an outstanding service tailored to their individual needs.

Our Private Client Team has extensive experience in delivering high-quality work in all matters relating to probate and estate administration. The team has expertise in high value estates and Inheritance Tax matters and have advised in estates involving former Lloyds names and complex estates involving Business and Agricultural assets.

For details of members of the team who may work on your matter, please visit https://www.latimerhinks.co.uk/who-we-are/our-people and click on the profiles below:

Elizabeth Armstrong
Natalie Palmer
Jennifer Quayle
Gillian Ibbotson
Daniel Williams
Kelly Maguire
Nicola Johnston
Anne Elliott
Nikita Noel
Elizabeth Moulding
Helen Black
Natalya Pursey

We may also involve Trainee Solicitors from time to time.

Where less experienced members of the team deal with your matter, they will be supervised by one of our more experienced team members and this information will be clearly stated in our Client Care Letter which will be provided to you at the outset of any matter.

Latimer Hinks
SOLICITORS

Private Client
Guidance on cost

How we charge

We promote transparency when it comes to our charges and will always provide you with a written quantified fee estimate once we understand how we can best help you. This is likely to be based upon our hourly rates and an estimate of how long we think it will take to complete the matter. In some limited circumstances, for very straightforward matters, we are able to offer a fixed fee, but it is more common for us to provide a fee estimate based on our hourly rates which we will not exceed without first informing you in advance and agreeing a new fee estimate if required.

We appreciate that every case is different. Whilst some clients are very happy to provide us with the information we need and let us deal with everything for them, other clients may need more care and attention resulting in more frequent meetings/telephone calls/emails or discussions being required which will inevitably increase our charges.

In probate cases, there are two stages for which you may require our assistance: -

1. Obtaining the Grant of Representation (Grant of Probate where there is a Will)
2. Administering the estate.

Regardless of whether there is a valid Will, where an individual dies leaving assets, a Grant of Representation is usually required. Where there is a Will, the Executors are responsible for obtaining the Grant of Probate.

Where there is no Will, the statutory rules of Intestacy determine who will benefit from the estate and therefore who can extract the Grant of Representation. The people responsible for administering the estate of someone who dies without a valid Will are known as the Administrators.

In both cases, to extract the Grant the Executors/Administrators need to establish the assets of the estate and submit an application to the Probate Registry. Depending on the assets within the estate, what lifetime gifts have been made and whether the estate is over the Inheritance Tax limit, an Inheritance Tax Account may also need to be submitted to HMRC. The Inheritance Tax Account is a snapshot of the value of the person's estate at the moment of their death and must include details of all assets, liabilities and gifts.

Once the Grant has been obtained the Executors/Administrators are then responsible for encashing or gathering in the assets, paying any liabilities and distributing the estate in accordance with the terms of the Will or, the

Intestacy rules (where there is no valid Will). In distributing the estate, the Executors/Administrators need to keep accurate records of what money has been received and paid out during administration of the estate and how the remainder has been divided and beneficiaries have a right to ask for a copy of this information.

Some clients may prefer our assistance just in extracting the Grant of Representation and feel that once the Grant has been obtained, they can deal with the administration themselves. Please note that this service is based upon you providing all of the correct information when we need it so that we can prepare the relevant papers. If upon receipt of the information it is incomplete or incorrect we reserve the right to increase our initial fee estimate to cover any additional work required. This option would also mean that you would be responsible for administering the estate yourself.

The role of Executor/Administrator can be onerous and as a result, many of our clients prefer to enlist our help from the outset with both obtaining the Grant of Representation and administering the estate so that they can rest assured that everything is taken care of for them. If this option is chosen, we will take care of everything from obtaining the information required to prepare the probate paperwork, right through to distributing the estate and preparing Estate Accounts to be given to each of the beneficiaries.

Where we act in the administration of an estate, our client is the Executor/Administrator. In many cases a significant amount of our time can be involved with providing advice to our client. This intangible product can be just as, if not more important than the production of physical documents, such as the probate paperwork. The advice we provide is aimed at ensuring the estate runs smoothly and that disputes (say between Executors and beneficiaries) where they arise, are quickly dealt with to keep costs to a minimum.

When choosing who to instruct in this type of work, our client's options may appear similar however, this does not always mean that the work will be the same. The quality of the advice provided to clients and the work undertaken is a key differentiating factor.

Our service and expertise incorporate a lot of work which you may not see but which is undertaken alongside the documents you will eventually sign and which, in this firm's opinion and in our experience, serve to ensure that your arrangements will do what they were intended for. The way we often explain this is that the documents clients see, and sign constitute only the tip of the iceberg. The bulk of the work, which is perhaps not seen (i.e. fully considered and thought-out advice, ancillary documents such as file notes, correspondence with HMRC etc.) remains "on file" to support the work

undertaken and to be relied upon in future if required.

Regardless of which option you choose, there are two main elements to our legal costs in dealing with non-contentious estates:

- our charges; and
- expenses we must pay on your behalf.

Our charges

As from the 1st of May 2026, our hourly charges range from £185 to £385 plus VAT (at 20%). Our hourly rates are dependent upon the level of experience and expertise of the person(s) dealing with the matter. To keep costs to a minimum there are often instances where two members of our team will work on the same matter - one with a higher hourly rate who can provide the knowledge and expertise and one with a lower hourly rate to undertake the day to day running of the file. We would always try to ensure that the most appropriate person is dealing with the case. We try to balance the complexity of the case with the expertise of the person undertaking the work.

We reserve the right to increase our hourly rates if the work to be undertaken is particularly complex or urgent, or if the nature of your instructions require us to work outside normal office hours. If this happens, we will notify you in advance and agree an appropriate rate.

We also reserve the right in some limited circumstances to base an element of our charges on the value of the estate reflecting the complexity of the matter and the risk and responsibility on this Company. The Law Society has set out guidelines allowing a percentage element to our charges. We only apply these percentage elements in a very small number of cases where we feel it is fair and reasonable in all the circumstances. Again, full details would be agreed at the outset.

In most cases, all time spent on a matter is charged on the basis of our hourly rates as set out above. This includes any time spent in meetings, making and receiving telephone calls and preparing letters and emails and considering letters and emails from the client, beneficiaries and other related parties. Recordable time also includes time spent preparing file notes of any calls received or made and attendance notes for meetings (you will appreciate that we must keep a detailed record of communications on file in line with our responsibilities and obligations). Travelling time will also be charged if and as applicable.

We tend to review our hourly rates on a periodic basis, usually on the 1st May each year. We will give you notice of any change to our hourly rates.

Latimer Hinks
SOLICITORS

Private Client
Guidance on cost

The exact number of hours it will take to complete a matter depends on the circumstances of your case. The following is not an exhaustive list of factors that might impact on overall charges but includes such things as:

- whether there is a valid will;
- how many assets there are to deal with and the nature and extent of those assets (such as properties, bank accounts, shares, bonds, business or agricultural assets);
- how many Executors are acting in the estate;
- how many beneficiaries there are (both legatees and residuary beneficiaries);
- whether there are any disputes regarding division of assets;
- whether there is any Inheritance Tax to pay;
- whether there are any claims against the estate;
- whether there are foreign assets;
- whether there needs to be reconciliation of lifetime gifts (which will impact on the inheritance tax liability) and if so, whether that reconciliation is carried out by us or the Executors;
- whether consideration needs to be given to claiming any reliefs for Inheritance Tax purposes.

In most probate cases where matters are straightforward, our charges can range from £1,000 + VAT and disbursements (where we are simply applying for the Grant) to £6,000 + VAT and disbursements (where we are dealing with more than just the extraction of the Grant).

Estates which are more complex e.g. those involving Inheritance Tax, income or capital gains tax, businesses or agricultural assets or Trusts are likely to involve more work on our part and could cost in the region of £15,000 + VAT and disbursements. The exact cost will depend very much upon the circumstances and complexity involved and this will be discussed and agreed with you prior to us commencing work.

VAT will be added to our charges at the prevailing rate, which is currently 20%.

If for example we are instructed to deal with an estate where there is a valid Will, one property, 2 – 3 bank accounts with a couple of beneficiaries (who are not disputing the Will), where there are no overseas assets or Inheritance Tax issues, then our charges are likely to be somewhere in the region of £3,500 - £4,500 + VAT for securing the Grant and administering the estate. The disbursements are likely to be Probate application fee (£300), sealed copies of Grant (£1.50 per copy), HM Land Registry documents (£6 + VAT), Trustee Act notice (circa £200 + VAT),

Unclaimed Assets Register search (circa £175 + VAT), Bankruptcy Searches (£2 + VAT per beneficiary).

In accordance with Money Laundering Regulations, we are required to verify the identity of all clients whether or not we have acted for them previously. Please note that as part of the process to verify our clients we will also conduct an online client verification and that there will be an administration fee of £15.00 (inclusive of VAT) payable for each individual in connection with this.

Disbursements

We would usually expect to incur certain expenses on your behalf which we will also add to the bill (and which will be payable out of estate funds).

Likely timescale and key stages

It is difficult to predict how long a matter will take to complete but, in most cases, where there are no complexities, we aim to be able to apply for Probate within 3 to 6 months of instructions being confirmed. While we endeavour to progress matters as quickly as we can this is often dependent upon our receiving responses from third parties, and possibly other external factors beyond our control.