



Probate – your questions answered

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making a difference

Life's legal
process
explained

What is Probate?

When a person dies, someone has to deal with their estate (money, property and possessions). They collect all the money and assets, pay any debts, and share what's left with those who are entitled to it.

Should I seek help with Probate?

In theory, you can handle Probate yourself, but the process can be both confusing and complicated. By appointing a professional to deal with the process you can ensure everything is completed correctly and without worry, during a very difficult time in most people's lives.

We can help with:

- General advice
- Funeral arrangements
- Valuing the assets and liabilities of the deceased's estate
- Finalising the deceased's tax affairs
- Property clearance
- Insurance on unoccupied property
- Completion of inheritance tax forms and payment of the tax due
- Applying for a Grant of Probate or a Grant of Letters of Administration
- Gathering assets
- Discharging debts/liabilities
- Locating missing beneficiaries
- Distributing the estate according to the Will or intestacy rules
- Preparing estate accounts for personal representatives



What happens if there is no Will?

A Will normally appoints someone to deal with the estate. If there is no Will, we can help those legally entitled to administer the estate. The people who are entitled to deal with the estate are known as Personal Representatives.

What is a Grant of Probate or Representation?

This is a document issued by the court which enables the Personal Representatives to access things like the deceased's bank account, investments, talk to pension providers and deal with property.

Will there be inheritance tax to pay?

If the estate is worth more than a certain amount, inheritance tax must be paid. The tax liability must be calculated and paid when the Grant is applied for.

What about outstanding debts?

We can advise you about liability for unpaid utility bills, loans, mortgages and credit cards.



Can you help me to prepare Estate Accounts?

Yes. We can prepare accounts showing the value of the estate at the date of death, together with capital adjustments, income details and showing the distributions made.



How can I deal with a large and complex estate?

Larger estates can be more complicated. We can help with a number of issues, including setting up and administering a Trust for a minor or a disabled person, dealing with foreign assets, capital gains or income tax.

Can you help me over the coming years?

We can provide ongoing support with:

- Creating and administering Trusts
- Advice on estate and tax planning
- Advice on preparing beneficiaries' own Wills
- Preparing a Deed to vary entitlement to the estate

What should I do next?

Call us.

We can then talk with you about the various ways we can help.



- We can provide one-off advice if you wish to obtain the Grant of Probate and administer the estate yourself.
- If you are comfortable collecting the assets of the estate and then distributing them, we can obtain the Grant of Probate only.
- Or we can obtain the Grant of Probate and complete the administration of the estate on your behalf, ensuring all legal and tax issues are dealt with correctly.

Once you have decided on the level of service you need, we can assess the circumstances and send you an estimate of our fees.

For further information simply send an e-mail to **willsandprobate@glazerdelmar.com** or **telephone 020 8299 0021**

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