

# ProTrust

## Estate Planning

### ESTATE PLANNING SERVICES

#### COSTS & CHARGES

The fixed costs set out below are inclusive of our first client meeting of advice (usually 1-2 hours) and inclusive of a subsequent meeting to run through draft documents. Time spent in providing additional or separate advice and any documentation not referred to below is chargeable at a standard hourly rate (provided at the foot of this document).

Costs marked with an “\*” are costs that shall involve certification from our nominated solicitor/chartered accountancy practice, and the overall cost to be confirmed by that firm. It shall be expected that there shall not be any additional fee other than as shown.

Disbursements to other parties such as HM Land Registry and The Office of the Public Guardian (OPG) may apply.

#### WILLS

<b>NEW WILL PREPARATION</b> (inclusive of a full review, preparation of a basic Will structure to include all usual clauses and administration provisions - no accompanying trusts or side documents)	£295+vat per person
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<b>NEW TRUST WILL PREPARATION</b> (inclusive of a full review and your IHT position, advice on options and all provisions, preparation of the Will-trust protection structure and all accompanying usual will clauses and administration provisions and inclusive of preparing the accompanying Memorandum of Wishes)	£495+vat per person
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<b>CODICIL</b> (to update existing Wills or Memorandum of Wishes with non-structural changes)	£125+vat per person
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#### LIFETIME FAMILY TRUSTS (GIFT & LOAN)

<b>DISCRETIONARY OR FLEXIBLE LIFE INTEREST TRUST</b> (usually capped at a trust value of £325,000 per person) Including a full review of your estate planning and IHT position, preparation of the trust Settlement	£425+vat per person*
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<b>DOCUMENTS TO ACCOMPANY THE TRUST</b> Supplemental Deeds (setting out future administration and destination of assets) Including where appropriate, assistance with preparing HMLR documents and to record as applicable the Trusts and registration at HM Land Registry (HMLR disbursements may apply in addition)	£325+vat per person*
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### **HMRC TRUST REGISTRATION**

With the Trust Registration Service (TRS) £195+vat per trust  
Including all work required to register an 'active' trust.

### **ARRANGING LIFE POLICIES INTO TRUST**

Fixed fee for arranging for your Life Policy or death in service pension benefit to be written into trust £295+vat per policy\*  
(2<sup>nd</sup> or subsequent policies) (£95+vat per policy)

### **INHERITANCE TAX CALCULATION AND REVIEW**

Preparation of a working IHT assessment covering your current expected IHT position (for a married couple or individual) £125+vat  
(for a couple or individual)

### **LASTING POWERS OF ATTORNEY (LPAs)**

**PREPARATION OF LPA** (Financial **or** Health & Welfare): £240+vat per LPA

For preparing **both** LPAs together (Financial **and** Health & Welfare)  
(50% off the second LPA i.e. a charge of £120+vat instead of £240+vat)

Therefore, **combined** total cost of preparation of both LPAs: £360+vat

**REGISTRATION AT THE OFFICE OF THE PUBLIC GUARDIAN** (Financial **or** Health & Welfare): £160+vat per LPA

Work to register **both** LPAs together (Financial **and** Health & Welfare) at the OPG  
(50% off the second LPA i.e. a charge of £80+vat instead of £160+vat)

Therefore, **combined** total cost for work to register 2 LPAs is £240+vat £240+vat

*Note: LPA OPG registration fees will apply for registration of LPAs  
£82 per LPA*

### **GENERAL POWER OF ATTORNEY**

Advice and preparation of a General Power of Attorney: £195+vat per person  
(This charge shall be waived if LPAs are undertaken also)

### **PROPERTY WORK**

#### **TRANSFER OF OWNERSHIP (at no financial consideration)**

Including either a formal Land Registry transfer or a Transfer of Equity under a Declaration of Trust. £495+vat per property estimated\*

Obtaining Office Copies of the Land Registry Title

Preparation of TR1 and AP1 Land Registration forms and then executing the registration of the property at the Land Registry

(To be undertaken by Solicitors and costs to be confirmed)

If separate consent(s) are needed from Existing Management

Company/Mortgage Company: additional charge per mortgage/charge consent.

<p><b>FIRST REGISTRATION OF TITLE (FOR UNREGISTERED LAND)</b> Obtaining original Title Deeds, checking the root of Title, preparing an up-to-date Epitome of Title, preparing the list of documents and the HM Land Registry forms FR1 and DL.</p>	£695+vat per property estimated*
<p><b>TENANTS IN COMMON OWNERSHIP (FROM JOINT TENANTS)</b> On the assumption the property is already registered at HM Land Registry in joint names (as joint tenants) Including obtaining Office Copy Entries of the Land Registry Title Preparation of Notices and arranging completion of Land Registration forms for the Land Registry submission</p>	£295+vat per property*
<p><b><u>COURT OF PROTECTION WORK</u></b></p>	
<p>Assisting with Deputyship applications (for persons lacking sufficient mental capacity &amp; where no LPAs are in existence): Costs are guided and often fixed by the Court of Protection. For other Court of Protection applications: hourly rate charges apply.</p>	£950+vat*
<p><b><u>OUT OF OFFICE APPOINTMENTS</u></b></p>	
<p>Where outside of Chilterns or London meeting (Based on a 1/2 hour additional time charge)</p>	£125+vat
<p><b><u>HOURLY CHARGING RATE</u></b></p>	
<p>For separate advice, ongoing acting and reviews following completion of primary documents (Wills etc), meetings, document review and preparation.</p>	
Robert Cartmell – Director	£250+vat per hour
Jeremy Mills – Director	£250+vat per hour
Support Staff	from £140+vat per hour
<p><b><u>STORAGE</u></b> (of all original completed documents, a one-off payment):</p>	
	£45+vat per person

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