



## PROBATE

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'Probate' is a term commonly used when talking about applying for the right to deal with a deceased person's affairs. It's sometimes called 'administering the estate'.

If there is a will, usually the deceased will have appointed executors to deal with the estate. If no executors were appointed, or there is no will, the court will appoint an administrator. Executors and administrators are known as personal representatives.

We can assist you in obtaining the grant of representation, enabling you to then deal with the administration of the estate once it has been received.

Alternatively, our Probate Department also offers a sympathetic, professional and efficient probate service whereby we undertake the day to day administration on your behalf at what is a distressing and stressful time. Under this service we will, on your behalf,

- establish the assets and liabilities of the estate
- prepare the documentation required to support your application for the grant of representation
- arrange for any Inheritance Tax to be paid (if appropriate)
- liaise with the Probate Registry until the grant has been issued
- realise and/or transfer the assets
- settle the liabilities
- finalise the deceased's income tax affairs
- deal with the sale of any properties and the settlement of the final invoices for the utilities,
- finalise the Inheritance Tax position (if appropriate)
- deal with any specific bequests and/or the payment of any pecuniary legacies
- prepare and submit a corrective Inheritance Tax Return and pay, or obtaining a refund of, any tax which may be due (if appropriate)
- complete the income tax return(s) for the estate's administration period and agreeing this with HM Revenue & Customs

- prepare the estate's accounts
- prepare the Income Tax certificates that the residuary beneficiaries will need in connection with their personal tax affairs
- distribute the remainder of the estate to those entitled

We also advise on post death Deeds of Variation of Wills and Intestacy. These are an excellent way of Inheritance Tax Planning by a beneficiary wishing to re-direct their inheritance from an estate and thus reduce their own estate and the Inheritance Tax payable at the date of their death.

If we can be of any assistance at this difficult time please do not hesitate to contact us.

### **Next Stage....**

Should you require any further information or seek to instruct us, please do not hesitate to contact David Ferraby at **dferraby@dflegal.com** or on 01684 850750

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Please note:

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