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private client

probate

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**Thomson Snell  
& Passmore**

At Thomson Snell & Passmore we are known for our expertise and specialism in probate and administration work. Our specialist probate lawyers can handle all aspects of the administration and winding up of estates of all sizes and complexity, in an understanding and efficient manner.

What is Probate & Estate Administration?

After a death it is necessary to deal with the deceased's assets and in order to do this, it is necessary in the majority of cases to obtain a grant of probate. The personal representatives owe a duty of care to the beneficiaries to ensure that the estate is administered correctly, in accordance with the terms of the Will or the laws of intestacy.

Simple? Probate is sometimes perceived as a straightforward area of law. However, this is not the case. Aspects of Succession, Revenue and Trust law are regularly involved and problems need to be overcome. The wealth and depth of experience and knowledge amongst our team will ensure that any complex issues will be dealt with competently.

What does probate involve?

- = Researching and assessing the value of an estate
- = Dealing with the deceased's income and capital gains tax liabilities
- = Preparing of Inheritance Tax accounts and forms
- = Applying for an appropriate Grant of Representation

- = Assisting executors in arranging IHT loans if necessary
- = Collecting in assets & dealing with creditors
- = Transferring legal title of assets to beneficiaries
- = Advising beneficiaries and executors on tax implications of selling assets and working with them to provide tax efficient strategies for dealing with assets
- = Dealing with Inland Revenue enquiries
- = Preparing personal representatives tax returns
- = Providing tax information for residuary beneficiaries
- = Preparing comprehensive and clear estate accounts, providing executors and beneficiaries with a full financial record of the estate

## Deeds of Variation

In addition to the above we specialise in advice on Deeds of Variation, which are very important tax planning devices for beneficiaries to consider, if they wish to redirect all or part of their inheritance. There are time limits to be adhered to and specific advice should be sought before a Deed of Variation is used in any particular case. Some of our experience in specialist Probate work includes:-

- = Lloyds Underwriters
- = Estates involving foreign assets
- = Resealing foreign probates
- = Acting for overseas lawyers in dealing with UK estates of foreign domiciliaries
- = Administering large and valuable estates

- = Intestacies
- = Agricultural and business property
- = Inheritance Act claims

### The Principal Contacts

Please feel free to contact anyone listed to discuss further any matter of probate law:

**Edward Fardell** - Solicitor, Partner and Head of Probate Division. Member of Society of Trust and Estate Practitioners.

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**Brian Bacon** - Probate Manager; Member of the Institute of Legal Executives.

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Thomson Snell & Passmore is one of the largest law firms in the South East. We have a highly regarded and steadily expanding private client practice. Our reputation is founded on a tradition of client care going back over 400 years. Many of our partners are recognised by the legal profession as leaders in their particular area of practice. We are one of a select few firms accredited with the prestigious Lexcel mark of excellence by the Law Society. Our private client lawyers embrace a wide range of specialist skills, enabling us to provide appropriate expertise across the legal spectrum, in even the most unusual of circumstances. Our clients come from all walks of life, including families which we have served for generations and entrepreneurs. We endeavour to develop a close working relationship with our clients - they say we are friendly and approachable. This leaflet offers an overview of services related to probate.

For more detailed information please visit our website at [www.ts-p.co.uk](http://www.ts-p.co.uk) or give us a call.

We look forward to meeting you.

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