

# Will & estate planning services

Your will is one of the most important documents you will ever sign. If you do not make a will, your estate could end up in the hands of people you have no wish to benefit. Moreover, you might have failed to take advantage of the tax and estate planning opportunities which often become apparent when making a will.

This booklet contains some basic information about our standard wills package and our estate planning services for more complex situations, so you can consider which option might be suitable and the likely costs involved.

Peace of mind for generations of families and businesses

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[www.ts-p.co.uk](http://www.ts-p.co.uk)  
@pragmaticlawyer

**Tunbridge Wells**  
Thomson Snell & Passmore  
Heathervale House  
2-4 Vale Avenue  
Tunbridge Wells  
Kent TN1 1DJ

**Thames Gateway**  
Corinthian House  
Galleon Boulevard  
Crossways Business Park  
Dartford  
Kent DA2 6QE

# Which will service is right for you?

To determine whether our **standard wills package** or **estate planning service** is right for you, please answer the following questions:

- |                                                                                                                                                                                                   |                              |                             |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|-----------------------------|
| 1. Are you enquiring about making a will on behalf of someone other than you or your spouse/civil partner?                                                                                        | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 2. Have you been married/in civil partnership before, do you have children from a previous relationship, or are you maintaining any person other than your spouse/civil partner or your children? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 3. Do you require advice on Inheritance Tax (or on other taxes) or advice regarding the joint ownership of property?                                                                              | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 4. Does your estate contain any business assets, unquoted shares, agricultural property (including woodlands), Lloyds underwriting assets, foreign property or interests under trusts?            | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 5. Do you want to impose specific restrictions on gifts, or leave all or part of your estate in trust?                                                                                            | Yes <input type="checkbox"/> | No <input type="checkbox"/> |

If you answered “no” to all of the above questions our standard wills package may be suitable for you. If you would like to take advantage of this convenient way of making a will, or if you simply require additional information, please call us on 01892 510000 and ask to speak with a member of the wills and tax planning team.

If you answered “yes” to any of the above questions, our standard wills package may not be suitable and you may need an estate planning consultation and possibly a more complex estate plan.

For a full breakdown of both services please read the next two sections.

“

Excellent. Quite personal... explaining everything in words and language that I could understand and keeping me up to date.

”

Client

# Standard wills package

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Thomson Snell & Passmore's standard wills package has been developed to make it easier for you to make a will, and to allow us to quote the fees shown below.

The standard wills package is intended to cover a number of typical situations where there is no requirement for complicated or unusual provisions, including:

- a couple who wish to leave their estates to each other and, failing that, to their children (if necessary on reaching a specified age)
- a couple who wish to leave their estates to each other and, failing that, to one or more named beneficiaries
- an individual who wishes to leave his or her estate to named beneficiaries

In each of these situations, the service can include provisions leaving cash legacies, disposing of personal effects, expressing any funeral wishes and, if relevant, appointing guardians.

The fees quoted include a short consultation (up to 30 minutes) in person or by telephone, preparation of the will(s) and sending the finished product to you for signature, or overseeing its completion at our offices.

## Fees for a standard will

1. Fixed fees for the standard wills package service:
  - One standard will £550 plus VAT
  - Two standard 'mirror' wills £750 plus VAT
2. Fees quoted are valid for 30 days from receipt.
3. The fees quoted do not include any subsequent work involved in amending wills to reflect changes to your instructions or the drafting of additional documents (e.g. letters of wishes).
4. Other advice not within the standard wills package service (such as tax planning) will be charged on the basis of time spent at a specified hourly rate with your prior authorisation.
5. Fees do not include VAT, which will be charged at the standard rate. Our full Terms of Business will be supplied on request or when confirming your instructions to proceed.

# Estate planning service

## Consultation

An estate planning consultation with one of our experienced trust and estate practitioners usually takes one to two hours. By the end of that consultation we will have identified the planning options available and will be in a position to confirm the costs of implementing your estate plan before we undertake any further work.

Consultation with you outside the office can be arranged and an additional charge will be made for the time spent travelling, plus expenses.

## Estate planning

Your individual plan may include advice on and the preparation of documents to include:

- The preparation of your will(s) including additional tax saving and asset protection provisions such as a legacy trust, life interest trust, rights of occupation, discretionary trust and letters of wishes.
- Advice on joint property ownership or the right to reside in property.
- Inheritance Tax advice, including allowances and exemptions and, where relevant, lifetime planning and the use of trusts or companies for asset protection and tax planning.
- Business protection and succession planning and Inheritance Tax advice on agricultural and business assets.
- Advice on potential claims against your estate or work arising from concerns about your capacity to make a will.
- Advice on domicile issues affecting the drafting of your will(s) and general advice on issues relating to foreign property.

## Fees for estate planning

- Fees for the initial estate planning consultation are likely to be between £460 and £760 (plus VAT).
- Fees for the preparation of your will(s) and related documents under our estate planning service will be at least £550 (plus VAT). This will be in addition to the cost of the initial consultation. The actual price, which we can estimate, will depend upon complexity and whether they are single or mirror wills for a couple, a letter of wishes is required, you wish to include complex or numerous legacies, or if it is necessary to alter the ownership of jointly held property.
- Fees for the implementation of lifetime gifts and estate planning, including the creation of trusts and other estate planning vehicles, will be discussed at (or shortly after) your initial consultation. Such fees may be charged on either a time spent or fixed fee basis, depending upon the nature of the additional work involved.

For further information on our estate planning service please call us on 01892 510000 and ask to speak with a member of the wills and tax planning team.