



# Probate & Estate Administration

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Licensed by the Institute of Chartered Accountants in England and Wales to carry out the reserved legal activity of non-contentious probate in England and Wales.





## Did you know that Greaves West & Ayre is now licenced to carry out non-contentious probate services in England and Wales?

Historically only solicitors have been able to legally manage someone's estate after death. Now chartered accountants also have the legal authority to provide non-contentious probate in England and Wales provided they are licensed or authorised to do so.

### What does that mean for you?

As Chartered Accountants our tax knowledge and experience of dealing with information in a structured way makes us ideally suited to efficiently deal with non-contentious probate and estate administration. Although time consuming and often challenging at a difficult time, probate is essentially a process driven service that deals with financial information. Our expertise and, in some cases, first-hand knowledge of the deceased's tax and financial affairs simplifies and speeds up the whole process. This is why our fees for probate are often lower than if you decided to involve other professionals.

If you are already a client we know you; we understand your business and your financial affairs, we may know your family and have considerable knowledge about your background and history. We have spent a long time building a relationship as your trusted adviser and creating a plan for your wealth. That puts us in a position to make sure that your estate is handled in not only a tax efficient way, but with respect, compassion and in accordance with your wishes.

Alternatively we are happy to work alongside your own professional advisers if they are not licensed for probate services.

### What is probate and estate administration?

When someone dies their estate must go through a process of probate, unless it is very small. It is the legal process of sorting out someone's property, money, and possessions after they've died. In Scotland, it's called confirmation.

**The process can be lengthy and complicated and will require the deceased's personal representatives carrying out the following steps:**

- Locating the current Will of the deceased
- Applying for the grant of representation
- Administering the estate, including liquidating the assets to pay debts and taxes and in preparation for passing to the beneficiaries of the estate
- Preparing estate accounts
- Distributing the assets to the beneficiaries in accordance with the Will, or the intestacy law if there is no valid Will.

**For more information about our probate services please contact Roseanne Bennett by phone on 01289 306688 or email [rmb@gwayre.co.uk](mailto:rmb@gwayre.co.uk)**