

# ProTrust

## Estate Planning

### ESTATE PLANNING SERVICES

#### COSTS & CHARGES

The fixed costs set out below are inclusive of our first discussion (usually 1-2 hours) and inclusive of subsequent meetings to run through draft documents. Those meetings may be in person at our offices or by video conference call. Time spent in providing additional or separate advice in writing or at further meetings 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/completion from our nominated solicitor/chartered accountancy practice, and the overall cost to be confirmed by that firm. Save where indicated in this document or in our letter of engagement, it shall be expected that there shall not be any additional fee from that firm to you (other than disbursements). Disbursements to other parties such as HM Land Registry and The Office of the Public Guardian (OPG) may apply.

#### DOCUMENT PREPARATION

##### WILLS

##### **NEW WILL PREPARATION**

(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)

£345+vat per person

##### **NEW TRUST WILL PREPARATION**

(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)

£750+vat per person

##### **CODICIL**

(to update existing Wills or Memorandum of Wishes with non-structural changes)

£145+vat per person

#### LIFETIME FAMILY TRUSTS (Including Lifetime Property Trusts)

##### **DISCRETIONARY OR FLEXIBLE LIFE INTEREST TRUST**

(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

£750+vat per person\*

<p><b>DOCUMENTS TO ACCOMPANY THE TRUST</b></p> <p>Supplemental Deeds (setting out future administration and destination of assets)</p> <p>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)</p>	£495+vat per person*
<p><b><u>DEED OF VARIATION TRUSTS</u></b></p>	
<p><b>DEED OF VARIATION TRUST</b></p> <p>(usually capped at a trust value of £325,000 per person)</p> <p>Including a full review of your estate planning and IHT position, preparation of the trust Settlement</p>	£750+vat per person*
<p><b>DOCUMENTS TO ACCOMPANY THE TRUST</b></p> <p>Supplemental Deeds (setting out future administration and destination of assets)</p> <p>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)</p> <p>**For all Lifetime Trusts or Deed of Variation Trusts – there will be elements of ongoing Trust Management – and we will send out a separate letter of engagement (from our Trust Management department) in that regard to cover those elements of ongoing work**</p>	£495+vat per person*
<p><b><u>HMRC TRUST REGISTRATION</u></b></p>	
<p><u>With the Trust Registration Service (TRS)</u></p> <p>Including all work required to arrange the registration of an ‘active’ trust.</p>	£275+vat per trust
<p><b><u>ARRANGING LIFE POLICIES INTO TRUST</u></b></p>	
<p>Fixed fee for arranging for your Life Policy or death in service pension benefit to be written into trust</p> <p>(2<sup>nd</sup> or subsequent policies written into trust)</p>	<p>£395+vat per policy*</p> <p>(£150+vat per policy)*</p>
<p><b><u>INHERITANCE TAX CALCULATION AND REVIEW</u></b></p>	
<p>Preparation of a working IHT assessment covering your current expected IHT position (for a married couple or individual)</p>	<p>£350+vat (for a couple or individual)</p>
<p><b><u>LASTING POWERS OF ATTORNEY (LPAs)</u></b></p>	
<p><b>PREPARATION OF LPA</b> (Financial <u>or</u> Health &amp; Welfare):</p>	£260+vat per LPA
<p>For preparing <b>both</b> LPAs together (Financial <b>and</b> Health &amp; Welfare) (50% off the second LPA i.e. a charge of £130+vat instead of £260+vat)</p>	
<p>Therefore, <b>combined</b> total cost of preparation of both LPAs:</p>	£390+vat per person

**REGISTRATION AT THE OFFICE OF THE PUBLIC GUARDIAN**

(Financial or Health & Welfare):

£180+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 £90+vat instead of £180+vat)

Therefore, **combined** total cost for work to register 2 LPAs is £270+vat

£270+vat per person

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

**BUSINESS LASTING POWER OF ATTORNEY (LPA)****PREPARATION OF BUSINESS LPA**

£300+vat per LPA

Inclusive of review for your business purposes and inclusive of all necessary provisions relating to your business

**REGISTRATION OF BUSINESS LPA**

All work to arrange registration of your business LPA at the Office of the Public Guardian

£200+vat per LPA

**LPA UPDATES**

Updating of LPA information to the Office of the Public Guardian on your behalf.

£45+vat per person

**GENERAL POWER OF ATTORNEY**

Advice and preparation of a General Power of Attorney:  
(This charge shall be waived if LPAs are undertaken also)

£275+vat per person

**PROPERTY WORK****TRANSFER OF OWNERSHIP (at no financial consideration)**

£495+vat per property  
estimated\*

Including either a formal Land Registry transfer or a Transfer of Equity under a Declaration of Trust.

Obtaining Office Copies of the Land Registry Title

Assisting with preparation of TR1 and AP1 or ancillary Land Registration forms.

Solicitors costs & HMLR disbursements for finalisation and lodgement to HMLR are to be confirmed in addition.

Note:

if separate consent(s) are needed from Existing Management

Company/Mortgage Company: additional charge from the conveyancing solicitors will apply for any such mortgage/charge consent.

**FIRST REGISTRATION OF TITLE (FOR UNREGISTERED LAND)**

£995+vat per property  
estimated\*

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><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>	<p>£295+vat per property  (50% of the cost for 2<sup>nd</sup> property)*</p>
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**COURT OF PROTECTION WORK**

<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>	<p>£950+vat*</p>
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**MEETINGS & ADVICE WORK**

**VIDEO MEETINGS (TEAMS/ZOOM CALLS)**

<p>1<sup>st</sup> Meeting or Discussion  Upon Instruction: 2<sup>nd</sup> (or 3<sup>rd</sup>) meeting to run through draft documents  Meetings for additional advice and assistance</p>	<p>No additional charge  No additional charge  Hourly Rates (see below)</p>
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**MEETINGS AT ONE OF OUR OFFICES**

<p>1<sup>st</sup> Meeting or Discussion  Upon Instruction: 2<sup>nd</sup> (or 3<sup>rd</sup>) meeting at one of our offices to run through draft documents  Meeting for Witnessing documents  Meetings for additional advice and assistance</p>	<p>No additional charge  No additional charge  No additional charge  Hourly Rates (see below)</p>
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**OUT OF OFFICE APPOINTMENTS**

<p>1<sup>st</sup> Meeting or Discussion  Upon Instruction: 2<sup>nd</sup> (or 3<sup>rd</sup>) meeting out of office to run through draft documents    Meeting for Witnessing documents at one of our offices  Meeting for Witnessing documents (at your home or out of office)    Meetings for additional advice and assistance</p>	<p>No additional charge  £125+vat per meeting  (inclusive of travel expenses)  No additional charge  £125+vat per meeting  (inclusive of travel expenses)    Hourly Rates (see below)</p>
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**HOURLY CHARGING RATE**

<p>For separate advice, ongoing acting and reviews following completion of primary documents (Wills etc), meetings, document review and preparation.  Robert Cartmell – Director  Jeremy Mills – Director  Support Staff</p>	<p>£295+vat per hour  £295+vat per hour  from £140+vat per hour</p>
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**STORAGE**

(of all original completed documents, a one-off payment):

£45+vat per person

**Dated/Updated: 28.01.2025**

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