

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

£495+vat per person

(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)

NEW TRUST WILL PREPARATION

£950+vat per person

(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)

CODICIL

£145+vat per person

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

TRUSTS

DISCRETIONARY OR FLEXIBLE LIFE INTEREST TRUST

£950+vat per person*

(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 to place assets for protection into a trust structure during your lifetime (rather than via a Will).

PROBATE TRUST A Probate Trust can be used to ensure that executors have immediate access to funds to cover probate fees and other expenses. By placing assets in the trust, they are kept outside of the estate and are not subject to freezing upon death. This helps avoid delays or the need for executors to borrow money during the probate process.	£950+vat per person*
EDUCATION TRUST An Education Trust allows you to set aside funds for education or university funding. Assets and any growth on the funds are outside of the estate. This might be suitable for either parents (or grandparents) who have the sufficient assets that they have earmarked for their children's education.	£950+vat per person*
LIFE INSURANCE TRUST Fixed fee for arranging for your Life Policy or death in service pension benefit to be written into trust. Includes any correspondence with the Life Insurance provider. (2nd or subsequent policies written into trust)	£950+vat per policy* (£350+vat per policy)*
DISABLED PERSONS TRUST Designed to provide for vulnerable beneficiaries with disabilities or lacking capacity to look after assets. In many cases, such a Trust can be created and used without affecting the entitlement of the beneficiary to means-tested benefits.	£950+vat per person*
LOAN TRUSTS (to grow assets but outside of your estate) Designed to place assets into a trust structure so that the growth is outside of the estate (and within the trust's protection). You still have access to the original amount invested, by virtue of you having 'loaned' the value to the Trust. You can undertake further IHT planning by 'waiving' segments of the loan repayments so that further sums are within the Trust's ownership and outside of your estate.	£950+vat per person*
PENSION PRESERVATION TRUST Placing pension and death in service benefits into trust can help ensure your assets are preserved and passed on to your chosen beneficiaries securely and tax-efficiently, providing greater control and peace of mind. Including liaising with the pension company as to nominating the benefit to the Trust structures you create. We offer a complimentary consultation with our in-house expert to help you explore the best strategies for investing trust assets.	£950+vat per person*
DOCUMENTS TO ACCOMPANY LIFETIME TRUST ARRANGEMENTS Supplemental Documentation (setting out future administration and destination of assets) 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)	£595+vat per person*
<u>DEED OF VARIATION TRUSTS</u> DEED OF VARIATION 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*

DOCUMENTS TO ACCOMPANY THE TRUST

£595+vat per person*

Supplemental Deeds (setting out future administration and destination of assets)

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)

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

HMRC TRUST REGISTRATION

With the Trust Registration Service (TRS)

Including all work required to arrange the registration of a newly 'active' trust.

£295+vat per trust
(50% reduction for any related trusts being registered)

INHERITANCE TAX CALCULATION AND REVIEW

Preparation of a working IHT assessment covering your current expected IHT position (for a married couple or individual)

£350+vat
(for a couple or individual)

CASH FLOW MODELLING

Comprehensive cash flow modelling review.

Assessment of financial position to help prepare for key milestones such as gifting, retirement and wealth transfer.

£350+vat
(for a couple or individual)

LASTING POWERS OF ATTORNEY (LPAs)

PREPARATION OF LPA (Financial or Health & Welfare):

£260+vat per LPA

For preparing **both** LPAs together (Financial **and** Health & Welfare) (50% off the second LPA i.e. a charge of £130+vat instead of £260+vat)

Therefore, **combined** total cost of preparation of both LPAs:

£390+vat per person

REGISTRATION AT THE OFFICE OF THE PUBLIC GUARDIAN

(Financial or Health & Welfare):

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)

£180+vat per LPA

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

£500+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)**

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.

£595+vat per property
estimated*

FIRST REGISTRATION OF TITLE (FOR UNREGISTERED LAND)

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.

£1,500+vat per property
estimated*

TENANTS IN COMMON OWNERSHIP (FROM JOINT TENANTS)

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

£395+vat per property
(50% of the cost for 2nd
property)*

COURT OF PROTECTION WORK

Assisting with Deputyship applications (for persons lacking sufficient mental capacity & 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.

£950+vat*

MEETINGS & ADVICE WORK**VIDEO MEETINGS (TEAMS/ZOOM CALLS)**

1st Meeting or Discussion

Upon Instruction: 2nd (or 3rd) meeting to run through draft documents

Meetings for additional advice and assistance

No additional charge

No additional charge

Hourly Rates (see below)

MEETINGS AT ONE OF OUR OFFICES

1 st Meeting or Discussion	No additional charge
Upon Instruction: 2 nd (or 3 rd) meeting at one of our offices to run through draft documents	No additional charge
Meeting for Witnessing documents	No additional charge
Meetings for additional advice and assistance	Hourly Rates (see below)

OUT OF OFFICE APPOINTMENTS

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

HOURLY CHARGING RATE

For separate advice, ongoing acting and reviews following completion of primary documents (Wills etc), meetings, document review and preparation.

Robert Cartmell – Director	£295+vat per hour
Jeremy Mills – Director	£295+vat per hour
Cameron McKay – Independent Financial Planner	£250+vat per hour
Support Staff	from £140+vat per hour

STORAGE

(of all original completed documents, a one-off payment):	£45+vat per person
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Dated: 12.10.2025

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