



Beneficial Trust  
& Will Company  
Est 1999

## CLIENT PRODUCT GUIDE

### Estate Administration Services

Beneficial Trust & Will Co Ltd can provide assistance and guidance on what to do when someone dies. If you have had a recent bereavement, you can expect to receive support regarding;

- Establishing the existence and validity of a will
- Requirements for statutory notices and the Probate process
- Collecting and collating the deceased assets
- Paying off the deceased persons debts and liabilities
- Establishing beneficiaries and inheritance rights
- Distribution of property and assets to the correct beneficiaries at the correct time
- Estate accounts (including tax calculations)

### What is Probate?

When a person dies, somebody has to deal with their estate (the money, property and possessions left behind) by collecting in all the money, paying any debts and distributing what is left to those people entitled to it. In order to get authority to do this they usually need to obtain a legal document called a Grant of Representation from the Probate Registry.

### Why is Probate needed?

Organisations holding money in the deceased's name need to know to whom that money should be paid and the grant is proof that the person named in it may collect the money. The distribution of the estate is the responsibility of the person named in the grant who will need to complete all of the tasks listed above.

## How can we help?

BTWC Ltd can handle the complete process on your behalf and all activity is conducted by our Solicitor Authority Regulated legal team. You can be assured that your requirements will be dealt with sensitively, professionally and as expediently as the process allows.

## Our Fees

The BTWC Ltd full Estate Administration service is available at a fee of 1.25% of the gross value of the estate.\*

*\*subject to a minimum fee of £1000 excluding VAT and disbursements*

For further information, please contact us;

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The information provided in this product guide is based on BTWC Ltd's understanding of the rules relating to this type of estate planning at the point in time at which this document was produced. Should these rules change in the future then BTWC Ltd does not accept any responsibility of future interpretation of this rules due to changes in legislation over which BTWC Ltd have no control.