

Timeline*

Steps

8

Step 1 - The first 3 days

What happens
Documents hand delivered to our offices in Bath by secure courier.

Staying informed
Letter sent confirming the main points of the meeting and the fee agreed.

Moving forward without delay
After the 'cooling-off' period of 7 days, we start work. If you wish us to start at once please call 0845 126 0891.

Step 2 - The legal review

What happens
Legal department will check all the documents.

Staying informed
If there are any issues to discuss, you will be contacted.

Moving forward without delay
Send any additional information as soon as possible using the pre-paid envelopes provided.

Step 4 - The asset and liability holders

What happens
All asset holders such as banks, investment providers and other professionals will be contacted, as well as companies linked to liabilities such as credit cards or mortgages and the funeral director.

If there is a Will, statutory advertisements are placed at this point. Unknown creditors and beneficiaries then have two months to make a claim.

Staying informed
Monthly updates are provided by your case manager.

Moving forward without delay
Please let us know if you discover any new information which may be relevant to the estate.

Step 5 - The tax returns and the Grant

What happens
Our tax department prepares Income Tax Returns to date of death and the appropriate Inheritance Tax Return.

The application for the Grant is made to the Probate Registry.

Staying informed
Your case manager will notify you that the Grant has been applied for, send a summary of assets and discuss any tax issues.

Moving forward without delay
Please check the summary of assets carefully and let us know if there is anything missing.

Step 6 - Receipt of the Grant

What happens
If there is no Will, statutory advertisements are placed at this point. Unknown creditors and beneficiaries then have two months to make a claim.

We advise how any property or Trusts should be handled.

Staying informed
Your case manager will write to confirm that the Grant has been received. If requested we can prepare and send you draft estate accounts.

Moving forward without delay
Let us know if you discover any new information which may be relevant to the estate. Please tell us at this stage if you wish to involve any of your professional advisers, e.g Financial Adviser.

Step 7 - Payment of liabilities, expenses, legacies and interim distributions

What happens
All assets collected in and the anti-money laundering identification documents checked.

Once the two month advertising period has passed, liabilities, expenses and legacies are paid.

Execution of your instructions in respect of any Trusts created in the Will.

Staying informed
If insufficient funds are available you will be contacted about how to proceed. Otherwise, we will arrange payment of liabilities, expenses, legacies and interim payments to residuary Beneficiaries.

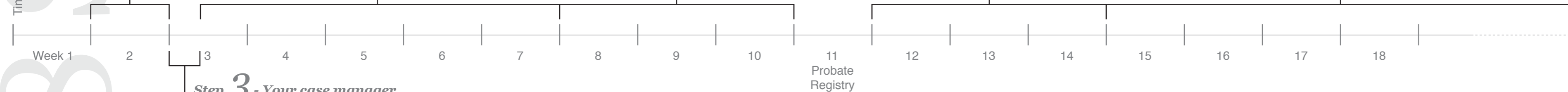
Moving forward without delay
Let us know if you discover any new information which may be relevant to the estate.

Step 8 - Final distributions and file closure

What happens
File review by our legal team. Distribution of remaining estate once approved accounts received from you.

Staying informed
Final estate accounts sent for your approval and statement of any outstanding matters.

Moving forward without delay
Please check the estate accounts and let us know if you have any queries. Sign a copy and return it to us so that we can distribute the estate as soon as possible.



Remember, you can contact us at any time
0845 126 0891



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