



Estate Planning Practitioners

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<i>Single Will</i>	<i>A Will for one person appointing executors and guardians, up to four specific gifts and distribution of the remaining Estate.</i>	<i>£180.00</i>
<i>Mirror Wills</i>	<i>Two Wills for a couple leaving everything to each other, then to children or other beneficiaries (up to four specific gifts per will)</i>	<i>£246.00</i>
<i>Bespoke Single Will</i>	<i>A Single Will for one person with unlimited specific gifts, provision for pets, exclusion clause and letter of wishes.</i>	<i>£270.00</i>
<i>Bespoke Mirror Wills</i>	<i>Mirror Wills for a couple with unlimited specific gifts, provision for pets, exclusion clause and letter of wishes.</i>	<i>£426.00</i>
<i>Mirror Wills with Trusts</i>	<i>Mirror Wills for a couple including Specialist Family Gift Trust in each (2 trusts in all, (Combined Nil Rate Band & Residential Nil Rate Band Trust plus Specialist IPDI Trusts Each) – The Most Inheritance Tax Efficient Will for Married Couples/ Civil Partners</i>	<i>£1197 (for two wills – mirrored)</i>
<i>Single Will with a Trust</i>	<i>A Will for one person including a Specialist Discretionary Trust within the Will (Combined Nil Rate Band & Residential Nil Rate Band Trust) – The Most Inheritance Tax Efficient Will (Combined NRB/RNRB discretionary Trust)</i>	<i>£780.00</i>
<i>Joint Wills (2 x Single Wills) with a Trust</i>	<i>A Will for 2 single adults in a relationship. (i.e. not Married or in a Civil Partnership) Includes a Specialist Discretionary Trust within the Will (Combined Nil Rate Band & Residential Nil Rate Band Trust) – The Most Inheritance Tax Efficient Will (Combined NRB/RNRB discretionary Trust)</i>	<i>£1097 (for two wills, joint)</i>
<i>Multiple/ Additional Will Trusts</i>	<i>Multiple trusts are great for promoting privacy especially between siblings who are beneficiaries of a trust. It also serves as an excellent planning tool for reducing or evening mitigating Periodic/Anniversary Charges within relevant property or discretionary trusts.</i>	<i>£149 (per additional trust within the Will)</i>

<i>Disabled Discretionary Trust within the Will</i>	<i>An additional trust written within the will to cater for the provisions of those who are vulnerable under the eyes of the law.</i>	<i>£720.00</i>
<i>Will amendments</i>	<i>Changes made to Wills drawn up ONCE Estate Planning *The cost of new Will applies if you require a full review</i>	<i>£84.00</i>
<i>Additional visit</i>	<i>If you require additional visits/ Online Meetings</i>	<i>£90.00</i>
<i>Specialist Estate Planning (Report)</i>	<i>(The report is an in-depth analysis of our suggested planning particularly related to application of the Finance Act 1986 Rules relating to Inheritance Tax Mitigation). Very useful for your executors to use at the time of applying for probate to support your specific case/ planning situation) Utilised for cases with GROB (Gift with Reservation of Benefit) situations. (Used for planning the use of any concessions to Gift with Reservation Rules and Rental Properties or Gifting a share of your home for IHT mitigation)</i>	<i>£2100</i>
<i>Finance Lasting Power of Attorney (LPA)</i>	<i>Giving the people you trust authority to make decisions about your finances if you are unable to. *Does not include OPG registration fee</i>	<i>£450.00</i>
<i>Health Lasting Power of Attorney (LPA)</i>	<i>Giving the people you trust authority to make decisions about your health if you are unable to. *Does not include OPG registration fee</i>	<i>£450.00</i>
<i>Both Lasting Powers of Attorneys</i>	<i>Finance and Health Lasting Power of Attorneys. *Does not include OPG registration fee.</i>	<i>£550.00</i>
<i>Business Lasting powers of Attorney</i>	<i>Giving the people you trust in your business the authority to make decisions for and on behalf of the business including the finances if you are unable to. Family members may not be the best people to run the business on your behalf *Does not include OPG registration fee</i>	<i>£850.00</i>

<i>Business Clause within The Will</i>	<i>Leaving a share of a business to your beneficiaries via your will rather than absolutely where this can affect the beneficiary's estate which may be at risk to threats such as Bankruptcy, Divorce, Remarriage, Long Term Care etc (if not protected).</i>	<i>£120.00/ per director/ partner</i>
<i>Business Property Relief Trust within The Will</i>	<i>By directing the Business Assets to a trust (via the will) this will provide ultimate protection and help mitigate Inheritance Tax as well as Generational Inheritance Tax</i>	<i>£420.00 per director/ Partner</i>
<i>Life Assurance Trust</i>	<i>Where a life insurance policy is NOT assigned or subject to a trust, especially where you suffer a critical or terminal illness, your life insurance policy could pay out a lump sum and that would be paid directly into the estate of your spouse or form part of your own estate.</i> <i>Not only would this INCREASE your incidence towards a potential Inheritance Tax Liability but will also be exposed to other threats such as Divorce, Bankruptcy, Generational Inheritance tax, care home fees etc. Use of a Dedicated Trust will allow you to take control and avoid unnecessary complications with the estate.</i>	<i>£420.00</i>
<i>Joint Life Assurance Trust</i>	<i>As above but designed for couples who have a joint policy that would pay out on either 1st or possibly 2nd death.</i>	<i>£720.00</i>
<i>Deed of Assignment (Life Assurance)</i>	<i>A deed of assignment is necessary to inform the life company where to direct the funds after a successful claim for critical or terminal illness and or death</i>	<i>£180.00</i>
<i>Declaration of Trust (Life Assurance)</i>	<i>An instrument used to assign/ reassign a beneficial share relating to a Life insurance policy</i>	<i>£480.00</i>
<i>Family Pension Death Benefits Trusts</i>	<i>Any lump sum death benefits payable from your pension could be assessed and considered as part of your estate or susceptible to potential threats such as Remarriage of a surviving spouse, Bankruptcy/ Creditor claims of the surviving spouse, care costs</i>	<i>£420.00</i>

<i>Nomination of Pension Death Benefits</i>	<i>Without making a specific nomination the Pension Death Benefit may be paid to someone you did not originally intent to benefit. The Pension Death Benefit may be subject to generational Inheritance tax or subject any other threats. If you set up a trust and do not complete the nomination, the trust will not work!</i>	<i>£108.00</i>
<i>Probate – full administration</i>	<i>Advice and assistance. Does not include disbursements</i>	<i>1% value of Estate at death</i>
<i>The Probate Preservation Plus Trust (PPPT) – Without Money Back Guarantee</i>	<i>Specialist Asset Protection Trust includes legal work and disbursements – To protect the Family home free of Entrance, Exit and Anniversary Charges</i>	<i>£2400.00</i>
<i>The Probate Preservation Plus Trust (PPPT) – Includes Money Back Guarantee</i>	<i>Specialist Asset Protection Trust includes legal work and disbursements – To protect the Family home free of Entrance, Exit and Anniversary Charges – includes money back guarantee</i>	<i>£3600.00</i>
<i>Family Gift Trust</i>	<i>Specialist trust for making gifts or reciprocal gifts during lifetime – typically for gifts of Money</i>	<i>£1800.00</i>
<i>Family Gift Trust - Additional</i>	<i>Specialist trust for making gifts or reciprocal gifts during lifetime – typically for gifts of Money or shares for multiple trust purposes or for a Spouse</i>	<i>£900.00</i>
<i>CGT Holdover Gift Trust</i>	<i>Specialist Gift trust where Capital Gains Tax (CGT) may be deferred – specialist tool useful for BTL/ additional property owners wanting to make gifts</i>	<i>£2400.00</i>

<i>CGT Holdover Gift Trust - additional</i>	<i>As above – typically for gifts of Money for multiple trust purposes or additional property owners wanting to make gifts of money or shares for multiple trust purposes or for a spouse.</i>	<i>£1200.00</i>
<i>Trust of Land</i>	<i>Specialist Trust based on the law of property act where a trust relating to land has been made verbally</i>	<i>£1800.00</i>
<i>Cross Option Agreement/ Business Will</i>	<i>Specific planning for businesses with more than one director or a partnership. Utilised upon the death of a Director or Partner and provides the business and the deceased directors family with a contingency plan via the use of options agreements.</i>	<i>£Price on Application (POA)</i>
<i>Partnership/ Shareholder Agreement</i>	<i>Provides a set criteria and operating code to protect the operation of a business (normally for partnerships or businesses with more than one director)</i>	<i>£ POA</i>
<i>Severance of Tenancy (mutual, non-mutual Shares or Unequal Shares)</i>	<i>It may be necessary to sever the tenancy on a joint ownership of a home. Under the law, notice should be served to render a severance valid. Situations may occur where such an event (serving notice) may be welcomed (mutual) or contentious (non-mutual) or sometimes to confirm an unequal share.</i>	<i>Up to £510 Please ask for Specific Quote</i>
<i>Funeral Plans</i>	<i>Pre-pay for your funeral now to save your loved ones added emotional stress on your death and pay at today's prices</i>	<i>Ask for costs</i>
<i>Probate – full administration</i>	<i>Advice and assistance. Does not include disbursements</i>	<i>1% value of Estate at death</i>

The information offered above is not to be construed or considered as advice (either investment or pension advice or specific advice to Wills and Trusts)

All Pricing Above INCLUSIVE of VAT