

Regulatory Information

As we are licensed/authorised for the reserved legal activity of non-contentious probate, in the unlikely event that we cannot meet our liabilities to you, you may be able to seek a grant from ICAEW's Probate Compensation Scheme. Generally, applications for a grant must be made to ICAEW within 12 months of the time you become aware, or reasonably ought to have been aware of the loss. Further information about the scheme and the circumstances in which grants may be made is available on ICAEW's website: www.icaew.com/probate.

Professional Indemnity Insurance

In accordance with the disclosure requirements of the Provision of Services Regulations 2009, details of our professional indemnity insurer and the territorial coverage can be found on our website at <https://www.hwb-accountants.com/about-us/insurance-information/>

Price Information

For straight forward estates (e.g. assets include a main residence, bank accounts, small portfolio of listed shares only, there is a will and all executors are acting) our fees for completion of the inheritance tax forms and grant of probate (form PA1P) are:

	£
Completion of the IHT205 and PA1P	£750 + VAT
Completion of the IHT400 and supplementary schedules and PA1P	£1,500 + VAT

Calculation of Fees

	£
Director	£280 + VAT
Manager	£135 + VAT

Our fees are based on the hourly charge out rates detailed above. Where there are complexities regarding the inheritance tax reliefs available (e.g. business property relief, residence nil rate band, transferable nil rate bands, gifts in the last 7 years before death) we will charge for our time advising on these matters in addition to the fees for completion of the inheritance tax and probate forms.

Service Information

The speed of turnaround of the inheritance tax forms is largely dictated by the availability of information and the format in which this is provided to us. In straight forward cases, where information is provided promptly, in excel format, as per our questionnaire, the forms can be completed in 2-3 months following receipt of the signed engagement letter.

The PA1P cannot be submitted for at least 15 days following submission of the inheritance tax forms. Provided these are submitted promptly, the whole process can be completed in 5-6 months.

Complaints and Redress

If you would like to talk to us about how we can improve our service to you, or if you are unhappy with the service you are receiving, please let us know by contacting Gary Brown. We will consider carefully any complaint that you may make about our probate services as soon as we receive it and will do all we can to resolve the issue. We will acknowledge your complaint within five business days of its receipt and endeavour to deal with it within 8 weeks. Any complaint should be submitted to us by letter.

If we do not deal with it within this timescale or you are unhappy with our response you may of course take the matter up with our professional body the Institute of Chartered Accountants in England and Wales and the Legal Ombudsman. Complaints to the Legal Ombudsman should be made within six years of the act or omission or within three years of you becoming aware of the issue, and in either case within six months of our written response to your complaint to us. The contact details for the Legal Ombudsman are:

Letter:	Legal Ombudsman, PO Box 6806, Wolverhampton, WV1 9WJ
E-mail:	enquiries@legalombudsman.org.uk
Telephone:	0300 555 0333