



JNP Legal Lifetime Planning Fees

Head of Department: Rebecca Rees

Solicitors: Rachael McCarthy-Jones (TEP), Loran Beynon, Emily Farmer, Kimberly Matthews

Paralegal: Amy Hoyland

Legal Assistant: Sasha Davies

Our Lifetime Planning department offers competitive and affordable fee packages for Wills, Lasting Powers of Attorney, Court of Protection applications, applications for Grants of Representation and Estate Administration.

As part of the service one of our experienced Solicitors will meet with you to take instructions and provide initial advice. A fee of £150.00 plus VAT and disbursements is charged for an initial Single Will appointment. A fee of £200 plus VAT and disbursements will be charged for an initial appointment on any other matter. This fee will be offset against the cost of any work we are officially instructed to undertake on your behalf.

JNP Legal have 4 offices – Merthyr Tydfil, Nelson, Llanishen and Pontyrcun. Our Solicitors will conduct face to face meetings at the office which is most convenient for you. Where possible, meetings can take place online or via the telephone. Please note that our offices are open 9am until 5pm, Monday to Friday.

At JNP Legal, we appreciate that planning for your future may give rise to challenges, but our friendly and approachable team can advise and guide you through every step of the process. If you would like to discuss any of these services in more detail, then please do not hesitate to contact us.

JNP Legal provide a comprehensive and clear pricing structure. Set out below are a range of packages to suit your individual needs.

Wills.

	Cost	VAT
Simple Single Wills	£194.00	£38.80
Simple Mirror Wills	£308.00	£61.60
Mirror Wills (inc severance of joint tenancy)	£450.00	£90.00
Simple will amendment	£96.00	£19.20

For more complex wills or advice on trusts, we charge competitive hourly rates. We will provide you with a quote upfront and no billable work will be carried out without your prior agreement.



Lasting Powers of Attorney.

	Cost	VAT
Single Financial or Health LPA	£418.00	£83.60
Single Financial and Health LPA	£578.00	£115.60
Joint Financial and Health LPA	£941.00	£188.20

In addition to our fees, there may be a registration fee of £82.00 per Lasting Power of Attorney, payable to the Office of the Public Guardian. However the Solicitor will discuss this further during your appointment.

Court of Protection (uncontested)

	Cost	VAT
Deputyship application – Property and Financial Affairs	£950.00	£190.00

In addition to our fees, an application fee of £371.00 is payable to the Court of Protection.

Application for Grant of Representation (Grant of Probate/Letters of Administration).

Depending on the complexity of the estate and whether an Inheritance Tax account has to be prepared, fees for obtaining a Grant of Representation (excluding Estate Administration) range from £783.00 plus VAT to £1,200.00 plus VAT

Please note that the following are not included in the fee quote:

Probate Registry Fee: £300.00 plus £1.50 per each sealed copy of the Grant.

Administration of Estate

Case example of administration of a non taxable estate.

This would include making an application to the Probate Registry for a grant of probate in a non taxable estate (where the estate is not liable to pay inheritance tax). Administering estate assets including a property, bank/building society accounts and investments. Paying any outstanding debts and expenses and distributing the estate to no more than 10 beneficiaries (all based in the UK and easily contactable).

Our Solicitors undertake estate administration work at hourly rates (as detailed below). We anticipate that the administration of a non taxable estate will take between 15 and 30 hours to complete, over a period of several months. However complex estates can take longer.

We estimate that legal fees for the administration of a non taxable estate will be in the region of £4,000.00 - £6,000.00 plus VAT. In addition to legal fees, disbursements would be payable.



The exact fees will depend on the individual case. However the fee estimate above is for cases where:

- The Deceased left a valid will.
- There is no more than one property
- There are no more than 6 bank or building society accounts
- There is no inheritance tax payable and the executors do not need to submit a full account to HMRC
- There are up to ten beneficiaries all of whom are based in the UK and are contactable
- There are no disputes between beneficiaries or claims against the estate.

Disbursements that are usually incurred in estate administration matters are:

- Probate application fee of £300.00 plus £1.50 for each sealed copy of the Grant
- Trustee Act Notice to protect the Executors against any claims from unknown creditors est. £200.00- £250.00
- Bankruptcy search (£2.00 per UK based beneficiary)
- Other disbursements may be incurred depending on the matter.

Additional legal costs:

- If there is no will there are likely to be additional costs, particularly if work needs to be undertaken to ascertain the family tree and those entitled to benefit from the estate.
- Conveyancing costs for acting in the sale of the deceased's property. Our conveyancing team will quote separately for this work.
- In some cases, the estate will have received untaxed income during the administration period or a property will have been sold for more than the death value. In such cases it may be necessary for the estate to file income or capital gains tax returns before the administration is concluded. This work is usually outsourced to an accountant who will quote separately.

Administration of Taxable Estates

It is often necessary to file an Inheritance Tax Return with HMRC when the estate has a large number of assets. Such estates are sometimes more complex to deal with and additional work needs to be undertaken. Our fees for conducting administration of taxable estates are usually in the region of £6,000.00 - £8,000.00 plus VAT. However, if the estate is simple, despite being high value, the fees are likely to be similar to those for non taxable estates as outlined above.

Fees for particularly difficult or demanding cases can exceed £8,000.00 plus VAT.

Timescales for Estate Administration

Obtaining the grant of probate usually takes 3 - 6 months. However this will depend on how quickly the assets and liabilities of the estate can be determined.



Once the Grant of Probate has been obtained, the estate assets need to be liquidated and collected in and any debts and estate expenses paid. Following this, arrangements can be made to distribute and finalise the estate

Overall, the administration of a non taxable estate is usually concluded within 8 – 12 months.

Please note that our fee does not include the following:

- Probate Registry Fee: £300.00 plus £1.50 per sealed copy and any other disbursements incurred as part of the estate administration.
- Conveyancing costs for acting in the sale of the deceased's property. Our conveyancing team will quote separately for this work.
- Finalising the estate's liability to Income Tax and Capital Gains Tax. This work is usually outsourced to an accountant who will quote separately for this work.

Additional fee information:

- Where JNP Legal are instructed to act a fee of £12.00 plus VAT per person is charged in order to verify our client's identity.
- A Digital Onboarding Fee of £4.10 plus VAT is charged per matter.
- Where our Solicitors are required to undertake home visits there will be a mileage charge. This is set at the rate of 45p per mile

Hourly Rates

Rachael McCarthy-Jones TEP	Associate Solicitor	£272.00
Loran Beynon	Solicitor	£233.00
Kimberly Matthews	Solicitor	£233.00
Emily Farmer	Solicitor	£189.00
Amy Hoyland	Paralegal	£134.00