


Private Client: Legal Fees

Accessible & Transparent Services with Clear Prices



Accessible Law: Private
Client

For more information on Private Client, please contact us:

 **0808 129 3320**

 [**info@simpsonmillar.co.uk**](mailto:info@simpsonmillar.co.uk)

 [**www.simpsonmillar.co.uk**](http://www.simpsonmillar.co.uk)

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We Don't Hide Our Prices

Professional and Cost Effective Legal Advice

Costs can often be an issue and for that reason we offer several funding options with many of our packages, based on a fixed fee. If the advice you need does not fall into one of our fixed fee packages, please get in touch and we will look at the advice you need, and provide you with our best estimate as to the overall costs involved, right from the outset. That way there are no surprises. Our aim is to be clear and open about costs right from the start.

Fixed Fees

We have set out overleaf our fixed fee service offerings for ease. The fixed fee applies to the service described. We will confirm to you at the outset, or as soon as it becomes clear, if any additional work that may be needed outside the terms of service. If this is the case, we will let you know as soon as possible and agree with you how any additional work is to be charged.

Bespoke Services & Hourly Rates

If you need more assistance than the fixed fee options permit we offer an hourly rate service which we will estimate at the outset of the matter. If you opt for this service:

- We will provide you with a costs estimate at the outset and update you regularly on your costs so you can stay in control
- We will expect to invoice you monthly and for you to discharge your invoices promptly
- A payment on account may be required
- All disbursements including court fees must be paid up front as you go along

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Declaration of Trust: £300

Professional and Cost Effective Legal Advice

You should consider a declaration of trust if you are buying a property with another person. It is imperative to agree and record how you wish to purchase and own the property: either as Joint Tenants or Tenants in Common. Both types of joint ownership have very different legal and financial consequences.

This Service Includes:

- Explaining the consequences of the different forms of joint ownership (ie joint tenancy and tenancy in common)
- Advising and taking instructions regarding a standard Declaration of Trust defining the ownership shares
- Preparing the Declaration of Trust
- Confirming correct execution of the Deed
- VAT



This Service Does Not Include:

- Drafting specific clauses dealing with various other aspects of co-ownership and co-habitation eg responsibility for property outgoings, options to purchase
- Dealing with complex calculations as to the respective financial contributions to the purchase of the property
- Specific advice regarding the many different forms of Declarations of Trust



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Get in touch to discuss your options today

Peace of Mind Package Available

We offer a 15% discount on our quoted prices, if you decide to instruct us to prepare a Will at the same time.

For more information on Declarations of Trust, please contact us:

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Court of Protection: Supported Deputyship Application £1,140

Specialist, cost effective legal advice

If your loved one has lost the capacity to make their own decisions, choosing to apply for financial deputyship with the Court of Protection can be baffling. Our fixed fee £1,140 service lets our solicitors take control of this process for you. We help make the process simpler whilst providing cost effective, professional support and advice.

The £1,140 Service includes:

- Arranging for a GP or consultant to undertake a mental capacity assessment
- Completing the application and supplemental forms regarding the protected person and the proposed deputy
- Advice on fee exemptions and remissions. Arranging these where appropriate
- Lodging the application with the Court of Protection
- Advising you and responding to the Court at each stage
- Assistance with setting up a surety bond
- Checking the Deputyship order and advising on any restrictions or conditions
- VAT



The £1,140 Service does not include:

- Collecting in information regarding the protected person's income and assets
- Disbursements
 - The lodgement fee of £400.00
 - The appointment fee of £100.00
 - The security bond premium
 - Medical fees for the assessment of capacity.
- Administration of the Deputyship after the order has been made
- Involvement in any dispute between the applicant and any third party
- Home visits
- Personal service of documents upon the protected person



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This service will not be suitable for applications to the court where the client's assets and property are likely to be significant and complex. Complicated personal circumstances, protracted applications or applications that involve minors, will also not be covered by this service.

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Single Lasting Power of Attorney: Health & Welfare OR Finance & Property £360

Cost Effective Future Planning

Deciding to set up a Lasting Power of Attorney (LPA) and potentially give someone else control over your finances or welfare in the future, is a big decision. It's easy to see why it's so important to get this right with the help of a specialist solicitor.

Our solicitors are professional, experienced and will provide you with the expert advice you need to rest assured that you're prepared for the future.

We know that everyone's circumstances are different, which is why we tailor our services to provide flexibility and choice. For **£360** you can specify the type of LPA you need; whether that is **health & welfare OR finance & property affairs**.


You can now plan for the unexpected for just **£360** for an individual, or **£600** for a couple (**where the same attorneys are being appointed**).

Simpson Millar's LPA package includes:

- Setting up **one type** of Lasting Power of Attorney (either welfare OR finance)
- Guidance on who to appoint as attorneys and how many
- Guidance in relation to replacement attorneys
- Guidance on how to appoint attorneys
- Guidance on how to sign the documents
- Advice as to your attorneys' duties
- Advice in connection with disclosure of your will to your attorneys and preparing letter of authority if appropriate
- Completing the registration forms to the office of the public guardian
- Advising on eligibility for discounted court fees or exemption
- Ensuring registration with the Office of the Public Guardian
- Secure storage of your Lasting Power of Attorney
- VAT



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The Package does not include:

- Drafting Preferences and Instructions in the LPAs
- Dealing with capacity issues
- Costs associated with chasing attorneys to sign documentation or re-issuing documents when incorrectly signed/witnessed
- OPG Registration Fees: currently these are £110 for each LPA registered unless the donor is eligible for exemption/reduction based on means.



The fixed fee applies to the service described. We will confirm to you at the outset, or as soon as it becomes clear, if any additional work that may be needed outside the terms of service. If this is the case, we will let you know as soon as possible and agree with you how any additional work is to be charged.

Get in touch to discuss your options today

Peace of Mind Package Available

We offer a 15% discount on our quoted prices, if you decide to instruct us to prepare both a Will and a Lasting Power of Attorney at the same time.

Lasting Power of Attorney: Fixed Fees

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Lasting Powers of Attorney for Health & Welfare AND Finance & Property

£600

Cost Effective Future Planning

Deciding to set up a Lasting Power of Attorney (LPA) and potentially give someone else control over your health & welfare and financial & property affairs in the future, is a big decision. It's easy to see why it's so important to get this right with the help of a specialist solicitor.

Our solicitors are professional, experienced, and will provide you with the expert advice you need to rest assured that you're prepared for the future.

You can now plan fully for the unexpected; our solicitors will help you set up Lasting Powers of Attorney covering both your health & welfare and finance & property affairs for just **£600** for an individual or **£960** for a couple (where the couple are appointing the same attorneys).

Simpson Millar's Welfare and Finance LPA Package includes:

- Setting up both types of Lasting Powers of Attorney
- Guidance on who to appoint as attorneys and how many
- Guidance in relation to replacement attorneys
- Guidance on how to appoint attorneys
- Guidance to you and your attorneys on how to sign the documents
- Advice as to your attorneys' duties
- Advice in connection with the disclosure of your Will to your attorneys and preparing letter of authority
- Completing the application forms to register the LPAs at the Office of the Public Guardian (OPG)
- Advice on eligibility for discounted OPG fees or exemption
- Ensuring registration with the OPG
- Secure storage of your LPAs
- VAT



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The Package Does Not Include:

- Drafting Preferences and Instructions in the LPAs
- Dealing with capacity issues
- Costs associated with chasing attorneys to sign documentation or re-issuing documents when incorrectly signed/witnessed
- OPG Registration Fees: currently these are £110 for each LPA registered unless the donor is eligible for exemption/reduction based on means.



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Peace of Mind Package Available

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Lasting Power of Attorney: Fixed Fees

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Probate: Grant only £960

Clear and Straightforward Legal Support

Dealing with an estate can be complicated, especially at what is, often a very challenging time; it can take months and making sure everything is done properly, can involve a great deal of unwelcome stress. Our solicitors can handle this for you with our fixed fee estate administration services, offering cost effective specialist legal solutions.

Every estate is different, which is why we provide a range of services to make sure that you get the right amount of support at the right fixed price to meet your individual circumstances.

Our Grant only service includes:


- Telephone consultation explaining the process involved
- Where there is no Will, acting on behalf of surviving spouse/civil partner or adult children to obtain Grant
- Where there is a valid will, acting on behalf of the executors appointed in the Will
- Completion of the short form Inheritance Tax return (IHT 205)
- Drafting Oath in support of application for Grant
- Obtaining the Grant of Probate or Grant of Letters of Administration and appropriate number of court sealed copies
- VAT



Our Grant only service does not include:

- Where there is no Will, no surviving spouse nor surviving adult children
- Advice relating to the legal validity of the Will or the meaning of the Will
- Advice relating to any further steps required to administer the estate
- Undertaking searches for a Will
- Advice relating to the Executors appointment
- Identifying beneficiaries of the estate
- Where the deceased was domiciled abroad or there are significant foreign assets
- Where the short form Inheritance Tax return (Form IHT 205) is not appropriate and the long form (Form IHT 400) is necessary
- Transfer of Inheritance Tax nil rate band (Form IHT 217)
- Registration/notification of death
- Organising valuations of assets in estate
- Dealing with any property related matters eg insurance, utilities, council tax

For more information on Probate, please contact us:

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- Advertising of statutory notices
- Any conveyancing which may be required to deal with property in the estate
- Inheritance tax, income tax or capital gains tax issues
- Payment of any money gifts in the will
- Payment of debts and liabilities in the estate
- Collecting in assets and distributing them to beneficiaries
- Preparation of estate accounts
- Any estate expenses such as probate court fees, oath fees
- Advice in connection with variation of the estate
- Conduct of the matter where a dispute between the parties arises.

The fixed fee applies to the service described. We will confirm to you at the outset, or as soon as it becomes clear, if any additional work that may be needed outside the terms of service. If this is the case, we will let you know as soon as possible and agree with you how any additional work is to be charged.

Get in touch to discuss your options today

Probate: Fixed Fees

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Probate: Small Estates Service: £3,000

Clear and Straightforward Legal Support

Dealing with an estate can be complicated, especially at what is, often, a very challenging time; it can take months and making sure everything is done properly, can involve a great deal of unwelcome stress. Our solicitors can handle this for you with our small estates package, offering cost effective specialist legal solutions.

Every estate is different, which is why we provide a range of services to make sure that you get the right amount of support at the right fixed price to meet your individual circumstances.

Our Small Estates service is right for you if:

- **you want us to deal with the whole estate administration**
- **the net estate is worth less than £325,000**
- **there are no more than five beneficiaries, AND**
- **there are no more than 10 institutions/providers who we need to deal with (in terms of assets & liabilities).**

Our Small Estates Service Includes:

- Intestate estates (where there is no will) but where there is a surviving spouse and/or adult children
- Collecting in information on the value of the estate
- Arranging payment of funeral costs
- Checking and putting in place house insurance, if necessary
- Liaising with all utility companies, council tax, TV licence, creditors, store card and club memberships
- Short form inheritance tax return
- Obtaining the grant of probate or grant of letters of administration
- Collecting in assets, payment of known debts and liabilities
- Advice relating to advertising for unknown creditors
- Reclaim of income tax (only if the deceased was not a self-assessed tax payer)
- Payment of all monetary gifts
- Finalising any estate income tax and capital gains with HMRC
- Preparation of a Final Estate Account
- Distribution of the estate between the beneficiaries and obtaining receipt for payment
- VAT



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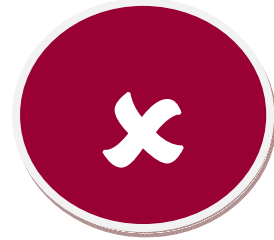
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The Small Estates Service Does Not Include:

- Administration of estates where the deceased was domiciled abroad or there are foreign assets to administer
- Undertaking a search for a Will
- Identifying beneficiaries of the estate
- Transfer of Inheritance Tax nil rate band or Long form inheritance tax return
- Conveyancing involved in transfer or sale of property
- Income tax returns to date of death if the deceased was a self-assessed tax payer.
- Dealing with the deceased's business
- Administration and advice relating to shareholdings and investment portfolios
- Administration expenses such as valuation reports and probate fees
- Variations to the Estate
- Contested matters ie where there is a dispute between the parties
- Matters where we estimate it will take us more than 15 hours to complete the estate administration



The fixed fee applies to the service described. We will confirm to you at the outset, or as soon as it becomes clear, if any additional work that may be needed outside the terms of service. If this is the case, we will let you know as soon as possible and agree with you how any additional work is to be charged.

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Compensation Protection: Personal Injury Trust: £588

Where your compensation is less than £100k

Simpson Millar's fixed fee **£588** service provides you with simple, straightforward advice. **If your compensation is under £100,000 and you are not appointing professional trustees**, we can help you to protect your compensation by setting up a personal injury trust. Our specialist solicitors are experts in this area of the law, making sure your financial award is well protected.

The £588 service includes:

- Discussions with you on who should be your trustees
- Guidance on the trustees duties and responsibilities
- Preparing the trust documentation
- Advice on executing the trust documentation and on setting up a trustee bank account
- VAT



The £588 service does not include:


- Trusts where the beneficiary is a minor
- Setting up the trust bank account
- Contacting the Benefits Agency
- Financial advice on investing trust monies
- Assistance with administering the trust
- Winding up the trust
- Trusts involving the appointment of professional trustees
- Assessments and concerns about capacity



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Compensation Protection: Personal Injury Trust: £1,140

Where your Compensation is over £100k and you may need a professional trustee

Simpson Millar's fixed fee **£1,140** service provides you with straightforward and specialist advice. **If your compensation award is over £100,000 and you may need a professional trustee**, we can help you protect your compensation by setting up a personal injury trust. Our solicitors are experts in this area of the law, and will make sure your financial award is well protected.

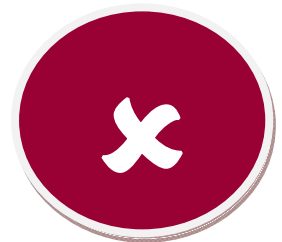
The £1,140 service includes:

- Discussions with you on who should be your trustees and whether a professional trustee is appropriate
- Guidance on the trustees duties and responsibilities
- Preparing the trust documentation
- Advice on executing the trust documentation
- Setting up a trustee bank account
- Taking receipt of the trust assets
- VAT



The £1,140 service does not include:


- Trusts where the beneficiary is a minor
- Financial advice on investing trust monies
- Assistance with administering the trust
- Winding up the trust
- Assessments and concerns over capacity



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Compensation Protection: Personal Injury Trust: £1,800

Where the beneficiary is a child

Simpson Millar's fixed fee **£1800** service provides you with straightforward advice as to how a child's compensation can be protected by setting up a personal injury trust. This will likely only be relevant where the child's compensation award is over £100,000.

The £1800 service includes:

- Discussions with you on who should be trustees for the child
- Guidance on the trustees duties and responsibilities
- Advice on whether a professional trustee is necessary
- Preparing the trust documentation
- Setting up a trustee bank account
- Taking receipt of the trust assets
- Draft witness statements for the release of funds from court
- VAT



The £1800 service does not include:


- Financial advice on investing trust monies
- Assistance with administering the trust
- Winding up the trust
- Travel to and attendance at any court hearing
- Other payments to third parties such as court fees
- Home visits
- Assessments and concerns over capacity



The fixed fee applies to the service described. We will confirm to you at the outset, or as soon as it becomes clear, if any additional work that may be needed outside the terms of service. If this is the case, we will let you know as soon as possible and agree with you how any additional work is to be charged.

Get in touch to discuss your options today

For more information on Personal Injury Trusts, please contact us:

 **0808 129 3320**

 info@simpsonmillar.co.uk

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Simple Wills By Appointment: Tier 1

From £240

Professional and Cost Effective Legal Advice

Not having a Will, or failing to have it written properly, can cause unnecessary stress and upset for your loved ones. You can safeguard against this by choosing our expert solicitors at Simpson Millar.

Our **Wills by Appointment** service ensures that you have everything you need to be fully organised and prepared for the future. Our prices aim to reflect the complexity or otherwise of your personal circumstances, the wishes you would like in your Will and takes into account the value of your assets.

If you have a spouse or partner, mirror wills are just **£360 for both**.

The Simple Tier 1 Will Service Includes:

- A 45 minute face to face consultation with a solicitor at our office
- Appointing executors and substitute executors
- Provision for funeral wishes
- Appointing guardians for your children
- Provision for up to 5 money gifts
- Provision to leave personal items to your executors to distribute to your chosen beneficiaries
- Advice relating to your intended beneficiaries of your estate
- A will pack and a summary of your will
- Signing at home or supervised signing at our offices
- Secure lifetime storage
- Registration with Certainty, the National Will Register backed by the Law Society
- Will review reminder every 3 years
- VAT



Wills : Fixed Fees

For more information on Wills and Probate, please contact us:

 **0808 129 3320**

 info@simpsonmillar.co.uk

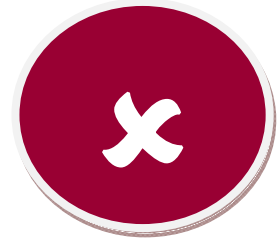
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We may not be able to offer this service if your circumstances include:

- Tax Planning and Pensions
- Mortgages and Life Insurance
- Disinheriting or leaving out family members
- Provision for children from previous relationships/ marriages
- Assets abroad
- Net Assets in excess of £300,000 for an individual or £600,000 for a couple
- Where individuals have connections with other legal jurisdictions



The fixed fee applies to the service described. We will confirm to you at the outset, or as soon as it becomes clear if any additional work that may be needed outside the terms of service. If this is the case, we will let you know as soon as possible and agree with you how any additional work is to be charged.

Get in touch to discuss your options today

Peace of Mind Package Available

We offer a 15% discount on our quoted prices, if you decide to instruct us to prepare both a Will and a Lasting Power of Attorney at the same time.

Wills : Fixed Fees

For more information on Wills and Probate, please contact us:

 **0808 129 3320**  info@simpsonmillar.co.uk  www.simpsonmillar.co.uk

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Enhanced Wills by Appointment: Tier 2 From £600

Professional and Cost Effective Legal Advice

Not having a Will, or failing to have it written properly, can cause unnecessary stress and upset for your loved ones. You can safeguard against this by choosing our expert solicitors at Simpson Millar.

Our **Enhanced Tier 2 Wills by Appointment** ensures you receive comprehensive legal advice on all aspects of your will, including areas requiring detailed, professional help such as gifts of property, the creation of will trusts, multiple beneficiaries and an overview of your Inheritance Tax position.

Our experts will make sure that you have everything you need to be fully organised and prepared for the future. We can also include a mirror Will if you have a spouse or partner for a total of **£780** for **both** Wills.

The Enhanced Tier 2 Will Service Includes:

- A one hour face to face consultation with a solicitor at our office
- Advice about appointing executors and trustees
- Provisions for funeral wishes
- Appointing guardians for children
- Provisions relating to your personal items
- Provision for money gifts
- Straightforward life interest trusts, asset protection trusts, vulnerable beneficiary and discretionary trusts
- Letters of Wishes for your trustees
- Advice relating to your inheritance tax position
- A will pack and summary of your will
- Signing at home or supervised signing at our office
- Secure lifetime storage for your will
- Registration with Certainty, the National Will Register backed by the Law Society
- Will review reminders every 3 years
- VAT



For more information on Wills and Probate, please contact us:

 **0808 129 3320**

 info@simpsonmillar.co.uk

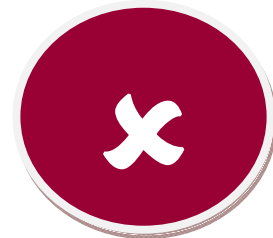
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We may not be able to offer this service if your circumstances include:

- Complex tax planning and Pensions advice
- Complex personal or financial circumstances
- Succession relating to your business assets
- Complex trust structures
- Multi-jurisdictional circumstances
- Borderline capacity issues



The fixed fee applies to the service described. We will confirm to you at the outset, or as soon as it becomes clear if any additional work that may be needed outside the terms of service. If this is the case, we will let you know as soon as possible and agree with you how any additional work is to be charged.

Get in touch to discuss your options today

Peace of Mind Package Available

We offer a 15% discount on our quoted prices, if you decide to instruct us to prepare both a Will and a Lasting Power of Attorney at the same time.

Wills: Fixed Fees

For more information on Wills and Probate, please contact us:

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Wills by Appointment: Property Protection £600

Professional and Cost Effective Legal Advice

Our **£600** fixed fee Property Protection Wills provides you with two mirror Wills designed to protect half the value of your property if you are a couple that owns a home together.

Not having a will, or failing to do it properly, can cause unnecessary stress and upset for your loved ones. This service enables you to make provision for children from previous relationships or can help to protect half the value of your home from care home fees.

The Property Protection Service includes:

- A one hour face to face consultation with a solicitor at our office
- Checking the joint ownership of your home and advising if any steps need to be taken to sever the joint tenancy
- Dealing with the severance of the joint ownership and registration of restriction at HM Land Registry
- A pair of mirror wills designed to protect your home
- Appointing executors and trustees
- Provision for funeral wishes
- Provision relating to your personal items
- Provision to allow the surviving owner to continue to live in the home
- Advice relating to the eventual beneficiaries of the half share of your home and the rest of your assets
- Signing at home, checked by a solicitor, or at our offices
- A Will pack and Summary of your Will
- Secure Lifetime Storage of your Wills
- Registration with Certainty, the National Will Register backed by the Law Society
- Will review reminders every 3 years
- VAT



For more information on Property Protection, please contact us:

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The Property Protection Service does not include advice relating to:

- Tax planning and Pensions
- Life Insurance and mortgages
- Complex personal or financial circumstances including disinheriting family members
- Succession of any business assets
- The inclusion of other complex trust structures eg discretionary and disabled persons trusts
- Significant assets abroad or where there are connections with other legal jurisdictions
- Joint net assets in excess of £600,000
- HM Land Registry fees



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Get in touch to discuss your options today

Peace of Mind Package Available

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