



# Myerson Wills, Trusts & Probate

Dealing with an Estate

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# Welcome

We understand the complexities of modern life, relationships, and the importance of taking care of you, your family and your financial interests. So it's a deep source of satisfaction that so many families, institutions and individuals choose Myerson as an integral part of their succession strategy and to assist with estate planning.

## Why Myerson?

Our specialist Wills, Trusts and Probate Team are all highly experienced and help executors deal with estates on a regular basis.

We are proud to be ranked as '**Top Tier**' in the prestigious international directory **The Legal 500** and commended by The Times '**Best Law Firms 2019**'. Therefore, you can be reassured you will receive a high-quality and truly bespoke service.



# How We Work.

Every client is different, and we are here to support you every step of the way.

**Personal, Partner-led Service.** We get to know you and aim to understand what you and your family want to achieve. We appreciate that every person's circumstances are different and, of course, have different attitudes to tax saving and also about the distribution of their estates. So we ensure that the advice is tailored and specific to you.

**The Highest Level of Expertise.** With specialist knowledge and accreditations such as **STEP** (Society of Trust and Estate Practitioners) and **SFE** (Solicitors for the Elderly), our solicitors are highly trained with the necessary skills to deal with a variety of complex matters, from vulnerable individuals to issues involving mental capacity.

**A Team You Can Trust.** You're in safe hands. We help clients nationwide with simple and complex Wills and estate planning on a daily basis. You can rest assured that our expert team knows its stuff!



# Your Solicitors



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**The solicitors that will be working with you are specialists.**


Sometimes the process of dealing with an estate can be daunting. All of our solicitors are specialists in dealing with the administration of estates and are here to guide and assist you through the process.

You can find out more about our Wills, Trusts and Probate team by clicking [here](#).



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# Our guide to dealing with an estate

## Where do I start?

The first step after a loved one has died is to register the death and to arrange the funeral.


The second step is to do a thorough search for a Will as it usually appoints someone to administer the estate (called an Executor).

The third step would be to inform financial institutions of the death to freeze any payments in or out of the bank accounts and to stop any further benefits or pensions being paid.

## What happens if the person dies without a Will?

If a person dies without making a Will, the Rules of Intestacy apply.

To find out more about Intestacy, ask a member of the Wills, Trust and Probate Team.



# What is the difference between a Grant of Probate and Letters of Administration?

A Grant is a legal document which confirms the people who have the authority to deal with the deceased's assets.

Where there is a Will, the Executors would extract a Grant of Probate.

If a person dies Intestate, those entitled under the Rules of Intestacy can extract Letters of Administration.

## What does an Executor or an Administrator have to do?

Executors and administrators must deal with the estate and distribute in accordance with the Will or the Rules of Intestacy.

This involves arranging the funeral, collecting details of the assets and liabilities, making an application for probate, gathering the assets and discharging any liabilities, and tax before distributing to the beneficiaries.

## Do I have to act if I have been appointed as an Executor?

Executors do not have to act. They can renounce their position entirely or reserve their position ("power reserved") if they feel that they might want to step in at a later stage. Executors are usually also appointed as Trustees if there are any ongoing trusts after the estate administration has concluded. Trustees can also retire if they do not wish to act.

# What information do I need to gather to apply for a Grant of Probate or Letter of Administration?

The estate will need to be valued at the date of death and therefore details of all assets and liabilities (whether owned jointly or in the sole name of the deceased) will need to be listed.

It is also helpful to have details of any gifts made or trusts set up within the 7 years before the date of death.

For estates where the deceased had a spouse who predeceased, it may be possible to claim their unused tax bands. In those cases, a copy of their Will, Grant, marriage certificate and National Insurance number will be required.

For a copy of our Probate Questionnaire, please [click here](#).

## How long does it take to obtain Probate?

The time frame depends on whether a copy of the Inheritance Tax form is sent to HMRC. If not, the Probate Registry aims to issue a Grant within 10 working days of receiving the application.

If the longer form is required, it can sometimes take a few additional weeks for HMRC to process the form and issue a receipt to the Probate Registry to allow them to issue the Grant.

## How much does it cost to deal with an estate?

Estates vary in size and complexity, which means the amount of work involved, and the costs can also differ.

For further information, please visit our pricing guide [here](#).

# Don't just take our word for it...

*"From our first telephone conversation, Myerson dispelled any doubts with a warm and friendly approach."*

*"Their response time and communication is excellent and I would have no hesitation in recommending Myerson in the future."*

*"The service we received at Myerson was sensitively handled, highly competent, professional, timely and efficient. The advice, guidance and support were excellent, well communicated and expertly executed."*

*"I would like to thank the team. I would heavily recommend them, and I have, to other friends and family. Their service has been efficient, speedy and reliable. Myself and my family found them very understanding, kind and friendly."*

*"I have total confidence in the advice and support I received."*

To view more Myerson reviews visit our Review Solicitors page by [clicking here](#).





# You're in safe hands!

If you would like further information about how we can help, or if you have any questions, please don't hesitate to contact a member of our Wills, Trusts and Probate Team today.

**Call: 0161 941 4000**

**Click: [myerson.co.uk](http://myerson.co.uk)**

**Email: [lawyers@myerson.co.uk](mailto:lawyers@myerson.co.uk)**



Because  
life is rarely  
**black** and  
**white.**



myerson



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