

Coffin Mew Solicitors – Wills, Trusts & Probate

Coffin Mew's probate service covers the following aspects of an administration:

- The initial interview and information gathering about the estate of the deceased.
- Informing all the necessary people (tax office, subscriptions, passport, doctor, utility providers etc)
- Dealing with the utilities (paying bills, final readings etc)
- Obtaining valuations of all the assets of the estate
- Establishing if there are any debts to pay and settling these.
- Arranging Trustee Act notices to protect against unknown creditors.
- Filling in Inheritance Tax forms, paying inheritance tax and getting clearance from HMRC.
- Arranging to transfer inheritance tax nil-rate-band where available to mitigate IHT.
- Organising funeral where necessary.
- Organising funds to be released to pay funeral account.
- Drafting the probate oath and arranging for the executors to swear the oath.
- Contacting pension providers (and arranging for pension benefits to be paid where appropriate)
- Contacting state pension and benefits and settling overpayments and enquiries.
- Finalising the income tax position (filling in self assessment form where necessary)
- Applying for a tax rebate (available on most estates due to the way the annual allowance works)
- Liaise with employers regarding death in service and any outstanding wages.
- Property aspects
 - Arranging valuations (3 for probate)
 - Arranging clearance of the property.
 - Marketing the property
 - Maintaining the property (winter drain-down and payment of service charge etc)
- Corresponding with life insurance companies.
- Realising the assets – filling in claim forms.
- Arranging for sale of shares – dealing with missing certificates.
- Ensuring all dates and deadlines (re tax and payment of legacies and council tax etc) are complied with.
- Drafting deeds of variation where necessary.
- Paying all legacies, disbursements and finalising all liabilities.
- Drawing up estate accounts detailing the full administration – showing all money that made up the estate, and where it's going.
- Distribution of the funds.
- Issuing tax certificates for all beneficiaries who require them for their tax records.