

# Rowlinsons

SOLICITORS



## Lost a loved one?



Looking for answers to the following questions?

- I just don't know what to do with the home! It's too big for me now.
- My wife didn't leave a will, does that mean everything passes to me, what about the children?
- Is there any inheritance tax to pay?
- What happens to our joint bank accounts?

**For further information please contact Rowlinsons on 01928 735 333.  
Alternatively, please e-mail [info@rowlinsons.co.uk](mailto:info@rowlinsons.co.uk)**



## Welcome to Rowlinsons

We appreciate that the death of a loved one is a difficult time. In view of this Rowlinsons have assembled a team of expert quality solicitors who are experienced in the administration of large and small estates and are sensitive to the needs of bereaved families.

We are proud to have achieved the high standards of practice and integrity required to become accredited with the Law Society's Wills and Inheritance Quality Scheme. This Scheme is your guarantee that our practice will provide high quality will drafting, probate and estate administration services.

Several members of the department are also STEP qualified. This means they are recognised as experts in their field and have committed to a high level of continuous training ensuring they will always be up to date with the latest legal, technical and regulatory developments that may affect you and your situation.



## How we can help

Whether or not there is a Will, legal work will need to be carried out in connection with the estate and this can often be complex. We appreciate that dealing with this represents a significant responsibility in what is already a distressing time. With this in mind we can relieve you of this burden and help you ensure that the wishes of the deceased are followed.

**We have experience of dealing with a wide range of probate related matters. We are able to offer practical advice following a death, and can assist with:**

- Evaluating the size of the estate
- Ascertaining whether any Inheritance Tax is payable
- Completing the Inheritance Tax Forms
- Arranging payment of Inheritance Tax with Her Majesty's Revenue and Customs (HMRC)
- Obtaining 'Probate'
- Closing Bank and Building Society Accounts
- Transferring or selling stocks or shares
- Obtaining the proceeds of any Life Assurance Policies
- Transferring or selling residential property
- Distributing the assets in accordance with the Will, or the rules on intestacy if the deceased did not leave a Will

**Our service can be tailored to your requirements, from handling the whole estate for you, to offering advice and guidance as you deal with it yourself.**

## We will provide you with:

### **A dedicated and experienced solicitor with specialist knowledge.**

We believe that all of our clients deserve great customer service. That is why you will deal with one individual who remains allocated to your case from beginning to end.

### **Easy access and no call centres.**

With direct dial telephone numbers and direct email access, a solicitor is always on hand to deal with your enquiries. We are also open on Saturday mornings and until 7pm on Tuesdays and Thursdays.

### **Free no-obligation first meeting.**

We will not charge for the first meeting. During this meeting we will advise as to the work required and options available in respect of the Estate administration.

### **Home Visits.**

If you live in the local area we are more than happy to visit you in the comfort of your home rather than you having to attend the office.

### **Fixed Price Guarantee.**

No charging by the hour or letter. You will know in advance how much everything will cost.

### **Plain language.**

We will avoid using legal jargon and will communicate with you in a way that meets your individual requirements e.g. email, telephone etc.

### **Legal Advice with service quality guaranteed.**

We are proud that our probate team consists of specialist solicitors who are fully trained and experienced in this area of work. Our Head of Department is a member of the specialist Society of Trust and Estate Practitioners (STEP).

### **Access to Rowlinsons other legal experts.**

We are not only probate specialists, we are a law firm. Whatever related matters arise during the course of your matter, we have solicitors in house who specialise in other areas of law and can assist.

### **Help in locating a Will.**

If you are unsure whether there is a will, or if you have found an old will but are unsure whether there is a more recent one anywhere, we can help you to carry out a search of the Certainty national wills register.

### **Help locating the assets in the estate.**

It is very important to ensure that all the assets are located, both for inheritance tax reasons and to ensure that the beneficiaries receive what they are entitled to. If required we can search various asset registers to ensure all assets are captured, particularly those that have perhaps been standing dormant for a long time.

# Your step by step guide to administering an estate

- 1.** The Executor of the Will, or the family of the deceased if there is no Will, confirm they wish Rowlinsons to act in the administration of the estate.
- 2.** We will write to all institutions where the deceased held assets, notifying them of the death and requesting valuations.
- 3.** We will advise of the options in respect of any residential property.
- 4.** When all the values are known we will prepare the Inheritance Tax forms and Oath and arrange a meeting with you to sign the documentation.
- 5.** We will submit the application for the Grant to the Probate Registry and deal with the payment of any Inheritance Tax.
- 6.** Once we receive the Grant from the Probate Registry we will forward this to all financial institutions asking them to close the various accounts and investments.
- 7.** We will receive the monies in, pay any debts owing and deal with the sale or transfer of any residential property.
- 8.** Estate Accounts will be prepared, showing monies received in the estate and monies paid out of the estate.
- 9.** We will distribute the monies to the beneficiaries of the estate in accordance with the Will, or if there is no Will in accordance with the rules of intestacy.

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

“ Very swift and efficient service.  
Excellent communication. ”

*MB, Stafford*

“ Fantastic service, exceeded  
expectations. ”

*AS, Manchester*

“ Great professional service, no  
complicated legal jargon. ”

*AJ, Colwyn Bay*

“ Many thanks for your guidance  
through the process, I really  
appreciate your frank and  
knowledgeable advice. ”

*RM, Hoole*



Expert legal advice isn't expensive  
**...it's priceless**

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