Nicklin
Chartered Accountants & Business Advisers

Private Client Fixed Fee Service List

Services	Net Fee £	VAT £	Total
Wills			
Single Will: • Telephone interview or access to online interview; • Prepare your Will ready for signature; • Provide a summary of terms; • Provide a personal items letters of wishes; • Provide signing guidance; • Store your Will and provide you with a copy.	200	40	240
Mirror Wills: • Prepare two Wills on identical terms to include the above services for two people.	340	68	408
Single Will including life interest trust of main residence: • Telephone or face to face interview • Prepare your Will ready for signature incorporating a life interest trust over your main residence; • Provide a summary of your Will; • Provide a personal items letter of wishes; • Provide signing guidance; and • Store your Wills and provide you with copies.	500	100	600
Mirror Wills including life interest trust of main residence: • Prepare two Wills on identical terms to include the above single Will services for two people.	750	150	900

Flexible Family Trust Wills and Inheritance Tax Planning:
• Each case will be estimated based upon the work required and fees are agreed with you in advance.
• Wills, Letters of Wishes and associated tax advice are tailored to client circumstances and financial protection requirements.
• The full service involves
  ○ In depth interview and assessment of family and financial circumstances
  ○ Submission of detailed recommendations
  ○ Detailed tax advice related to trusts and succession planning
  ○ Provision of Wills to include agreed Family Trust arrangements
  ○ Provision of detailed Letter of Wishes acting as family wealth governance roadmap
  ○ Further meetings and conferences as necessary
	2,400 to 5,000		

Codicil to existing Will • Preparing a codicil to make a maximum of two changes to an existing Will, excluding incorporation to trusts; • Provide signing guidance; • Store your codicil with your Will and provide a copy. Mirror codicils • Prepare two codicils for two people of identical terms	150 250	30 50	180 300
Home visit in Halesowen area (add to the above fees)	200	40	240
Severing joint ownership of property to tenants in common (associated with Mirror Wills that included a life interest)			
Facilitating Notice of Severance	200	40	240
Lasting Powers of Attorney			
Single person single Lasting Power of Attorney (either Health & Welfare or Property and Financial Affairs) • Preparing one type of Lasting Power of Attorney for one person. • Providing signing guidance • Registration with the Office of the Public Guardian; and • Storing your Lasting Power of Attorney.	300	60	360
Joint persons Lasting Power of Attorney (either Health & Welfare or Property and Financial Affairs) • As above to include preparing one type of Lasting Power of Attorney for two people.	500	100	600
Single person both Lasting Power of Attorney (both Health & Welfare and Property and Financial Affairs) • Preparing both types of Lasting Power of Attorney for one person; • Providing signing guidance; • Registration with the Office of the Public Guardian; and • Storing your Lasting Power of Attorney.	500	100	600
Joint persons Lasting Power of Attorney (both Health & Welfare and Financial) • As above to include preparing both types of Lasting Power of Attorney for two people.	650	130	780
Lifetime Trusts (we are able to provide the tax and legal advice. We do not currently hold a licence to physically prepare Trust Deeds and we outsource this aspect to a law firm. You will at all times remain our client and the outsourcing of this work is paid for and engaged separately by Nicklins)			

Advising upon and facilitating Death in Service Trust and letter of wishes	500	100	600
Advising upon and facilitating property ownership Declaration of Trust	500	100	600
Advising upon and facilitating a Life Interest Trust or Family Discretionary Trust for use in lifetime estate planning including: • Advice and full tax consideration in relation to Inheritance tax, income tax and capital gains tax; • Facilitating the Trust deed • Registration and reporting of trust at HMRC; • Preparation of accompanying letter of wishes; and • Attendance to take your instructions. • Ancillary matters such as claims for hold over relief and the need to organise or facilitate property or share valuations are charged separately.	2,400	480	2,880
Stand Alone Detailed Planning Recommendations Report			
Estate details summary, inheritance tax assessment, capital gains tax and income tax rules summary, detailed recommendations and benefits report plus taxation summary (including ten year and anniversary charges if relevant).	2,500 to £5,000	500 to £1000	3,000 to £6,000
Share Valuation Service			
Unlisted Privately owned shareholdings	Price available upon enquiry		
Listed stocks and shares for Probate valuation	Price available upon enquiry		
Probate/estate service			
Stand-alone Service (Grant only) for *excepted estates*: • Prepare statement of truth; • Prepare IHT205; and • Submit application to Probate Registry. • Client investigates estate values and assets. **Full Service** Add on: • Nicklin to carry out investigative work regarding the estate on behalf of client; • Subsequent administration of the assets; • Preparation of estate accounts; • Advice in relation to executors' duties/responsibilities	1,000 Charged at hourly rate of £200. An estimate of costs will be provided on examination of estate papers.	200	1,200
Stand-alone Service (Grant only) for *non-excepted estates*: • Prepare statement of truth;	2,000	400	2,400

• Prepare IHT400 and relevant schedules; • Submit IHT400 to HMRC for tax reference; • Submit application to Probate Registry. • Client investigates estate values and assets and details with payment of inheritance tax. **Full Service** Add on: • Nicklin to carry out investigative work regarding the estate on behalf of client; • Payment and assessment of inheritance tax; • Subsequent administration of the assets; • Obtaining HMRC clearance; • Preparation of estate accounts; • Advice in relation to executors' duties/responsibilities	Charged at hourly rate of £200. An estimate of costs will be provided on examination of estate papers.		
Any estate work undertaken may require the payment of other disbursements such as Land Registry fees Probate Registry fees and other disbursements which will be made clear on a case by case basis.			