Our probate service

Applying for the grant of probate only

Stage 1 – Initial meeting

We will arrange an initial meeting to discuss the deceased's estate and the application process (approximately 1 to 1.5 hours)

Stage 2 – Client care letter & funeral support

We will issue our initial letter enclosing our client care letter, including a cost estimate. and provide any assistance or advice regarding the funeral as necessary.

Timescale: once our letters have been sent, we are reliant upon third parties to come back to us in a timely manner. We have little control as to how long third parties take to respond.

Stage 3 – Gather information

We strongly recommend instructing us to write to various parties, for example, banks, investment managers, utility suppliers etc to notify them of the death and request date of death valuations. We will ask for the information that will commonly be required when applying for a grant of probate and completing inheritance tax paperwork. Asking for all of the information needed in one go can save time and money overall, rather than going back and forth to obtain further information. If you would prefer to contact all necessary parties, we will rely on you to supply all of the correct information needed.

Stage 4 – Apply for grant of probate

We will obtain the relevant documents and valuations required to make the application for the grant of probate. We will also complete any inheritance tax paperwork, the online probate application and prepare a draft legal statement for your approval and signature.

Timescale: after receipt of all date of death valuations we would expect to have draft paperwork to you within three weeks.

Timescale: it is currently taking c.16 weeks for the probate registry to issue a grant for standard applications. More complex applications and paper-based applications can take considerably longer.

Stage 5 – Submission

Once approved and signed we will submit any inheritance tax paperwork to HMRC. We will then submit the grant of probate application on your behalf and forward the original documents to the probate registry.

Timescale: we're required to wait for HMRC to issue a code, which will take approximate 20 working days to confirm receipt of the paperwork before being able to prepare the probate application.

Stage 6 – Grant issued

Once the grant of probate has been issued, this will be sent to the executors to complete the administration process. : it is currently taking approximately 16 weeks for the probate registry to issue a grant for standard applications. More complex applications and paper-based applications can take considerably longer.