



## WILLS, TRUSTS & ESTATE PLANNING SERVICES

### COSTS & CHARGES

The costs set out below are inclusive of our client's 1<sup>st</sup> meeting of advice (usually 1-2 hours) and inclusive of a subsequent meeting to run through draft documents. It is usual for us to also provide a summary document relating to Wills, trusts or LPAs undertaken. Time spent in providing additional or separate advice is chargeable at a standard hourly rate (at the foot of this document). The fixed costs that apply to our preparation of documents are usually highlighted in 'yellow' in a document similar to that below, as options for our clients to consider at the end of our first meeting or discussion. This will then form a total estimate.

Costs marked with an "\*" are costs that shall involve certification from our nominated solicitor/chartered accountancy practice, and the overall cost to be confirmed by that firm. It shall be expected that there shall not be any additional fee other than as shown. Disbursements to other parties such as HM Land Registry and The Office of the Public Guardian (OPG) may apply.

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Total Estimate of our work – all matters in 'yellow': £  
 (include here disbursements: eg: OPG LPA registration fees: £82 per LPA) £            )

Comprising (matters in 'yellow')

<b><u>WILLS</u></b>	
CODICIL – to deal with the non-structural changes to Wills	£125+vat per person
NEW WILL PREPARATION (where there are no accompanying trusts)	£295+vat per person
WILL PREPARATION (with trusts separately drafted)	£175+vat per person
STORAGE of originals (one-off payment):	£35+vat per person
<b>ADDITIONAL WORK - TRUSTS WITH WILLS</b>	
FLEXIBLE WILL-TRUSTS (Life Interest Trusts or Discretionary Trusts)	
(i) For Estates up to £325,000 per person Including a tailored Trust and Including tailored guidance in a Memorandum of Wishes	£395+vat per person
(ii) For Estates over £325,000 per person Including tailored Trusts and Including tailored guidance in a Memorandum of Wishes	£595+vat per person
LIFETIME (GIFT & LOAN) TRUSTS (£325,000 cap per person to transfer into trust)	£495+vat per person*

Discretionary Trust (£325,000 cap each)

Documents to accompany the Trust: £245+vat per person\*  
Supplemental Deeds  
(setting out future administration and destination of assets)  
Including where appropriate, assistance with preparing HMLR documents  
and to record as applicable the Trusts and registration at HM Land  
Registry or HMRC.

**DEED OF VARIATION**

Deed of Variation (advice, meetings and document drafting) £495+vat per person\*

Deed of Variation Trust Documents (Loan Advancement) to accompany a Deed of Variation that incorporates a Trust: £425+vat per person\*  
Deed of Equitable Charge  
Deed of Assignment  
Deed of Promissory Note  
Supplemental Deed  
Preparing RX1 & AP1 Land Registry documents to record the Trusts  
and registration of them at HM Land Registry

**LIFE POLICIES INTO TRUST**

Fixed fee for arranging for your Policy to be written into trust £295+vat per person\*  
(2<sup>nd</sup> or subsequent policies) (£95+vat per Policy)

**LASTING POWER OF ATTORNEY (LPAs)**

**Preparation of LPA: £240+vat for one LPA** £360+vat per person  
For preparing **both** LPAs together  
(1/2 price off the 2<sup>nd</sup> LPA ie a charge of £120+vat instead of £240+vat)  
Therefore **combined** total cost of preparation of 2 LPAs

**Registration at the Office of the Public Guardian: £120+vat for one LPA** £180+vat per person  
Work to register **both** LPAs at the OPG  
(1/2 price off the 2<sup>nd</sup> LPA ie a charge of £60+vat instead of £120+vat)  
Therefore **combined** total cost for work to register 2 LPAs

**GENERAL POWER OF ATTORNEY**

Advice and preparation of a General Power of Attorney: £150+vat per person  
(this charge shall be waived if LPAs are undertaken also)

**TENANTS IN COMMON LAND REGISTRATION**

Assisting in preparing Notice of Severance, HMLR Forms SEV and AP1 £245+vat  
Obtaining Office Copy entries of Title and filing the registration per property\*  
application to HM Land Registry, receiving amended Title and forwarding  
to you:  
(Note: in the event there are more than the one property to convert for  
you, we charge only 50% of the cost ie £122.50+vat per additional  
property)

**PROPERTY TRANSFER WORK (NO FINANCIAL CONSIDERATION)**

Including either a formal Land Registry transfer or a Transfer of Equity £495+vat per property  
under a Declaration of Trust. est\*  
Obtaining Office Copies of the Land Registry Title £95+vat\*  
Preparation of TR1 and AP1 Land Registration forms and then executing  
the registration of the property at the Land Registry  
(to be undertaken by Solicitors and costs to be confirmed)  
If separate consent(s) are needed from Existing Management

Company/Mortgage Company: additional charge per mortgage/charge consent.

**FIRST REGISTRATION OF TITLE (FOR UNREGISTERED LAND)**

Obtaining original Title Deeds, checking the root of Title, preparing an up to date Epitome of Title, preparing the list of documents and the HM Land Registry forms FR1 and DL. £595+vat per property est\*

**COURT OF PROTECTION WORK**

Deputyship applications (for persons lacking sufficient mental capacity & where no LPAs are in existence): £950+vat\*  
Costs are guided and often fixed by the Court of Protection.  
For other Court of Protection applications: hourly rate charges apply.

**OUT OF OFFICE APPOINTMENTS**

**(based on a 1/2 hour additional time charge)** £125+vat  
Robert Cartmell  
Where outside of Chilterns or London meeting

**TRAVEL TIME/COST**

From London Office (outside W1) or outside of Chilterns £95+vat

**MEETINGS FOR ADVICE (with no further instruction)**

Robert Cartmell (based on 2 hours time but 1 hour's charge) £250+vat

**LETTERS OR EMAILS OF ADVICE (with no further instruction)**

Robert Cartmell  
Legal Estate Planning and taxation advice £175+vat  
(based on approx ¾ hr reviewing and advising in writing or by email)

**HOURLY CHARGING RATE**

Robert Cartmell Director £250 +vat per hour

**ANNUAL RETAINER**

(following completion of your initial work in setting up Wills/LPAs) £100+vat per annum  
Including: for an individual  
A 6 monthly general Estate Planning update. £150+vat per annum  
An annual Estate Planning review meeting specific to your matter. for a couple with  
Ongoing Care and conduct over the matter of your Wills or LPAs. mirrored  
arrangements.

**Completed By:** Robert Cartmell

**Dated/Updated:** **26<sup>th</sup> April 2021**

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