

SCHEDULE OF SERVICES**1. RESPONSIBILITIES AND SCOPE FOR ACCOUNTING SERVICES****1.1 Your responsibility for the provision of information**

- 1.1.1 You will provide us with all papers, information and explanations relevant to the purpose and compilation of the probate/administration application and the administration of the estate and you will disclose to us all relevant information in full.
- 1.1.2 You will provide us with a brief family tree and up to date names and contact details for all beneficiaries.
- 1.1.3 You are responsible for ensuring that, to the best of your knowledge and belief, the financial information you provide us with, is accurate and complete.
- 1.1.4 You are responsible for informing us of anything that might indicate that there is any contentious probate action to be taken. If a matter becomes contentious you may need to employ a solicitor to deal with the contentious matter. We will not be able to work on the estate until the contention has been cleared.
- 1.1.5 You will provide us with a copy of the deceased's last will and any codicils/You will confirm that as far as you are aware the deceased did not leave a will.

1.2 Probate and Estate Administration

Include items under 1.2.1 and 1.2.2 as appropriate

Our responsibilities

- 1.2.1 We have agreed to carry out the following services on your behalf
 - (a) Send notifications of death to financial institutions, Government organisations, utilities and household contacts.
 - (b) Finalise the income tax and capital gains tax position of the deceased at the rate of death. This work to comment from [insert date of commencement of tax year concerned];
 - (c) Review the will, codicils and legacies to ensure that they are valid and prepare affidavits where necessary;
 - (d) Ascertain who the beneficiaries are;
 - (e) Identify the composition of the estate and ascertain whether a grant is needed.
 - (f) Value the estate;
 - (g) Prepare the inheritance tax return
 - (h) Prepare the papers for application for a grant of probate/grant of administration;
 - (i) Place statutory notices of death in the London Gazette and Lancashire Evening Post;
 - (j) Ensure the appropriate oaths are prepared and taken;
 - (k) Obtain the grant;
 - (l) Take control of and gather in the assets of the estate;
 - (m) Pay the debts of the estate including tax liabilities;
 - (n) Finalise the estate tax;
 - (o) Pay legacies and transfer the balance to the residuary beneficiaries;
 - (p) Prepare estate accounts.

Your responsibilities

1.2.2 You have agreed that you will/have:

- (a) register the death and obtain copies of the death certificate;
- (b) arrange the funeral;
- (c) send notifications of death to family members and friends

Date: 20 November 2024

McDade Roberts Probate Limited