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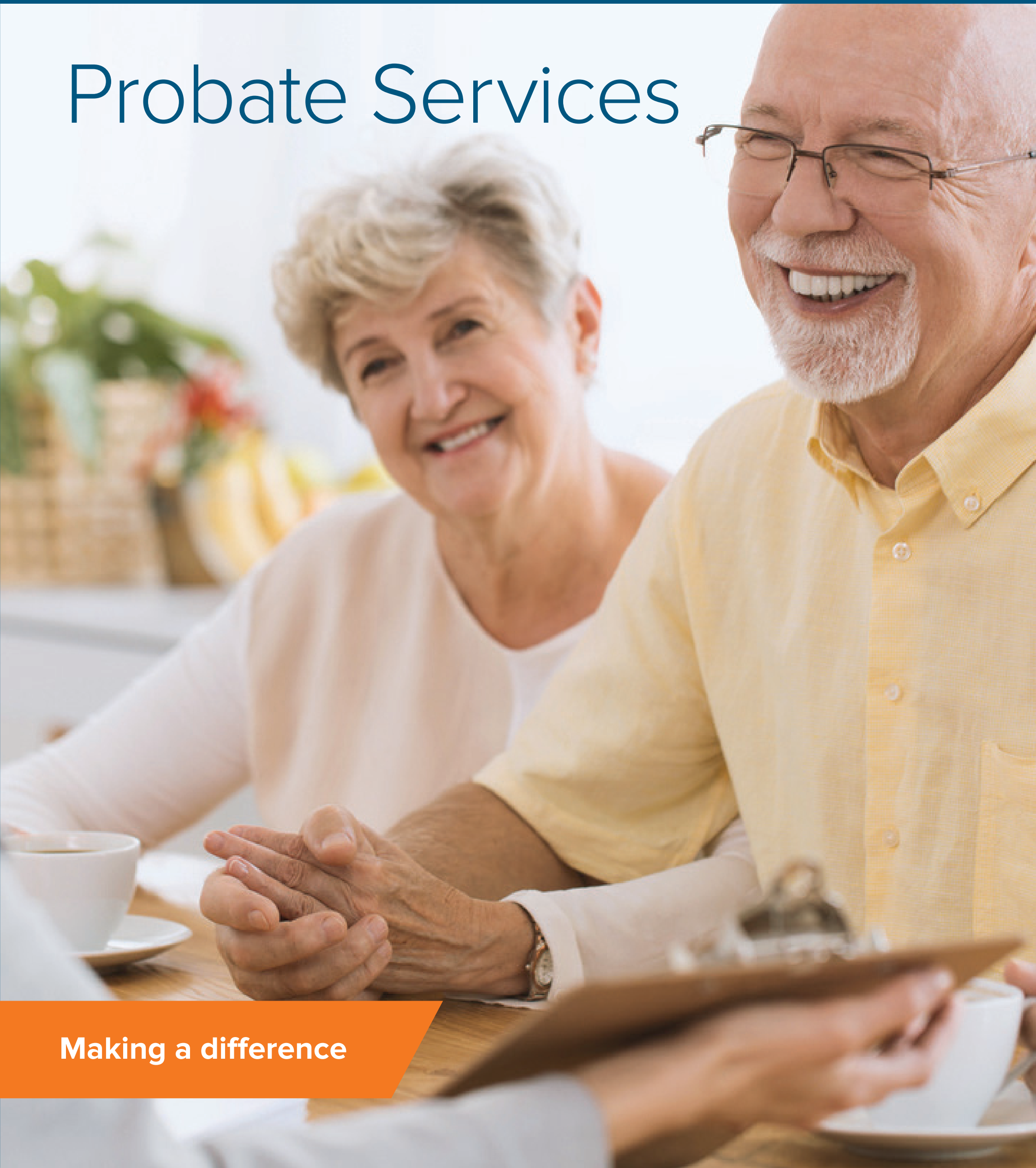
Probate Services



Making a difference

A sympathetic approach

Dealing with probate is often quite challenging and can be a complicated and lengthy process.

Probate involves administering the estate, preparing the accounts and distributing the assets to the beneficiaries. Moreover, this all comes at a difficult time when you are having to cope with the death of a loved one.

At Knill James we can do all of this for you and advise on all aspects of the probate process. We are one of a small number of accountancy firms who are licensed to carry out probate work. With a sympathetic approach at all times, we will help you to finalise probate quickly and with the minimum of fuss.

Our specialist team is able to handle all aspects of the probate process, including probate and tax forms, accounts preparation and estate administration, which means we can deal with everything, so you don’t have to.

Expertise you can trust

For our existing clients, we are ideally placed to do probate, as we already know all their financial affairs.

This background knowledge saves a huge amount of time that would otherwise be needed to gather all the necessary information. Saving time also means you save on costs which would otherwise be incurred by the Estate.

In addition our team of experts will ensure that the Estate's tax liability is kept to a minimum. All of these factors mean that more of the Estate can be passed on to the beneficiaries.

We can help you with:

- Applying for the Grant of Probate
- Completion of Inheritance Tax forms
- Administration of the Estate
- Calculating inheritance tax and considering any planning opportunities for the beneficiaries
- Considering and discussing the use of Trusts and Deeds of Variation
- Acting as executors

If you prefer to complete the probate application and inheritance tax forms yourself, we also offer a review service.

Why choose us?

'When our mother died, we suffered the understandable emotional trauma. Within days it suddenly dawned on my brother, sister and I that having never been through a situation like this before, there was a lot to do – from registering the death, to organising the cremation and service and, of course, probate.

It is a tortuous process at a time of high emotional anxiety and we were really pleased when Knill James told us they could take this process away from us and deal with it on our behalf. They have been understanding, tolerant and highly competent – in a word professional.

We would highly recommend them to anyone in a similar situation.'

Lindy, Joe & David Waters

'My family have been clients of Knill James for many years, so it made sense to ask them to do the admin of my father-in-law's estate, because they already had an in-depth knowledge of our affairs. It was also a real weight off our minds to know that their experts would handle everything.

The probate application was quickly sorted, along with all the inheritance tax forms and schedules for HMRC. They also worked out what the inheritance tax liability was and advised us how best to pay it.

Kirsty and the team were really sympathetic and helpful, and it was reassuring to know they were dealing with it all, so we could focus on other things.'

Julie Franklin

Understanding our clients' needs first

We work hard to get to know you in order to deliver timely, individual advice on how to manage and protect your business and personal wealth.

As a talented team of financial experts, our starting point is always the same: to understand our clients' needs first. We pride ourselves on our personalised client care, supplying tailor-made advice to help you achieve your personal financial goals.

Our aim is to provide valued advice and results that make a difference.

The Team

Nick Rawson, FCA
Probate Partner

nick@knilljames.co.uk
01273 484923

Nick has a wealth of experience in advising a wide range of clients from individuals to businesses built up over his 25 years as a partner. He holds the SWAT Certificate in Probate and Estate Administration and heads up the service as Head of Legal Practice.

Kirsty Royds-Jones, CTA
Tax Manager

kirstyr@knilljames.co.uk
01273 485094

Kirsty specialises in probate and estate administration and leads the service. She has worked in private practice for over 20 years and holds the SWAT Certificate in Probate and Estate Administration, as well as being a Chartered Tax Adviser.

Kaye Thomas, ATT
Tax Manager

kayet@knilljames.co.uk
01273 484926

Kaye's whole career has been in taxation, firstly with HMRC and then in private practice for the last 30 years. In recent years she has also been dealing with probate and estate administration.

Jamie Bird, CTA
Senior Tax Manager

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01273 484932

Jamie has extensive experience in providing advice to individuals on all aspects of their personal taxation affairs. He works with Kirsty on IHT and family wealth planning.

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