

Trust services

Trust company executorship and probate services

Introduction

Our specialist executorship and probate service is used by solicitors and accountants across the country. The same specialist service is available for our own private clients and we are willing to discuss individual requirements at any time. We appreciate that our service needs to be flexible enough to meet the requirements of estates, whatever their size. We can offer an individually balanced service which offers:

- Acting as executor
- Full estate administration
- Accountancy and taxation advice
- General support and advice.

The service

The same care, courtesy and attention to detail are applied to all aspects of our work, and as appropriate, we can:

- complete draft/interim accounts to assist with outstanding matters, corrective affidavits or prior to interim/final distributions;
- complete final short form or comprehensive accounts which are easily understood;
- correspond with the HMRC and complete all relevant tax forms and calculations, and advise on the quantum and payment of liabilities;
- provide pre and post death advice to minimise the tax payable on death and during the period of administration;
- provide a professional, timely and efficient service to ensure completion of an estate in a appropriate manner.

Benefits

The efficient administration of an estate facilitates easy identification and early transfer of entitlements to beneficiaries. Creditors, professional and administration expenses are paid on time and consequently professional reputations will be enhanced.

Fees

Our work is competitively priced and like most professional advisers we charge on a time spent basis. Charges depend on the extent of our involvement. **Where we or one of our principals are appointed as an executor, we reserve the right to levy a charge based on the value of an estate.** If required, we will be happy to give a more accurate indication of our fees on an individual basis.

For more information please contact:

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Our experience

We are a trust company which specialises in all aspects of trust and probate work. As such we are able to act as a professional trustee/executor or to work alongside and compliment the role of the trustee/executors. We have an extensive skill base including a high number of registered trust and estate practitioners, chartered tax advisers and qualified accountants and are able to offer a comprehensive service which brings together legal, accountancy and taxation requirements.

Rathbone Trust Company Services available include:

Taxation

- Tax returns for individuals and trusts
- Pension planning
- Investment tax planning
- Self-assessment enquiries
- Tax investigations

Tax planning

- Wills and inheritance tax
- Capital gains tax
- Offshore planning
- Income tax

Trust services

- Trust administration
- Trust accountancy
- Trusteeships

Charities

- Preparation of accounts for charities
- Administration
- Tax returns for charities

Executorship and probate

- Executorships
- Estate administration
- Support work for solicitors and other agents
- Preparation of accounts to beneficiaries and HMRC