



**PROBATE SERVICES**

Get in touch with us to discuss your probate requirements

01424 730000 | [info@mcpersons.co.uk](mailto:info@mcpersons.co.uk)

# Why choose McPhersons to look after your probate?

**We are committed to making this process as easy for you as possible by taking away the worry at a difficult time.**

**T**rust – we already have a relationship with you and you are familiar with the way we work, our responsiveness and proactive approach.

**R**egulated - we are an ICAEW qualified and accredited Chartered Accountant which provides you with the assurance that if there's a problem you are covered.

**U**nderstanding - we're familiar with your family and/or business so are not starting from scratch.

**S**ave money - we have much of the information needed so can complete the process more efficiently and cost-effectively.

**T**ime - we are used to tight deadlines and are a modern, high-tech firm able to complete the process quickly.

**E**xpertise – we know your financial situation and probate is a financial process after all. It involves preparing accounts and calculating tax liabilities.

**D**iverse client base – we work with such a broad range of clients and have probably experienced even the most unusual of situations before.



# What's involved?

**A Grant of Probate is the documentation required to release assets after the death of a loved one. If there are savings or properties to be distributed, you will usually need a grant of probate to progress any further. We are ideally placed to do probate for our existing clients as we're already familiar with their financial affairs.**

This will save a lot of time gathering information and hence the cost incurred on the Estate should be lower. Our dedicated tax team will work with our qualified probate specialists to ensure the Estate's tax liability is minimised.



We can help you with all or some of the following:

- Application for Grant of Probate
- Completion of all Inheritance Tax paperwork
- Calculation of Inheritance Tax as well as assisting beneficiaries with future planning
- Administration of the Estate
- Advising on Trusts
- Advising on Deeds of Variation
- Offering advice on wealth management and investment for beneficiaries
- Acting as executors

**We gather all the information from you and from this, can provide a cost estimate. If you would prefer to do some of the work yourself to reduce costs, this is fine. We will give you a fixed price for the work we do at an hourly rate. [Read more](#) on costs involved.**

*"Many thanks for sound advice and clear explanation of complicated tax issues. As always, I really appreciate the way everyone at McPhersons is always so unfailingly helpful and friendly." – John Cole, Photographer"*

# Who's involved?



**Ainsley Gill BA (Hons) FCA BFP -**  
Ainsley is one of the longest serving Directors at McPhersons and has a wealth of experience supporting a portfolio of corporate and private clients. He is qualified to undertake Probate work.



**Louise Cavill FCCA ACA TEP**  
Louise is a Director at McPhersons and also a full STEP member meaning she has specialist knowledge in inheritance and succession planning, trusts and estates. She is also qualified to undertake Probate work.



**Dan Cruikshank CTA -** Dan is a Tax Associate at McPhersons. He works closely with the probate team advising on complex tax issues. He has many years of experience in Inheritance Tax planning and property tax. He is a Chartered Tax Adviser.

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