



# HATHER

Financial Services

*With you now, for the future*

## **Details of Our Will Writing Services**

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Website: [www.hatherfinancial.co.uk](http://www.hatherfinancial.co.uk)

Address: Hather Financial Services Ltd., Old Passenger Station, Lazonby, Penrith,

Cumbria, CA10 1BD

Advice on the following services is not regulated by the Financial Conduct Authority (FCA).

## Will and Estate Planning Fees – Valid until 01 Jan 2023

All fees include VAT. Payment will be required before final copies are sent for signing. Please read 'fee details' over the page for full details regarding what is included within the fees.

### Will and LPA Pricing (Court fees are charges in addition to our fees)

Single	Our Fee	Court Fee	Couple	Our Fee	Court Fee
Standard Will	£180	N/A	Standard Will for Couple	£295	N/A
Advance Planning Will	£400	N/A	Advanced Planning for Couple	£600	N/A
One LPA	£300	£82	One LPA Each	£450	£164
Both LPA's	£550	£164	Both LPA's	£900	£328

### Will and LPA Packages

Single	Our Fee	Court Fee	Couple	Our Fee	Court Fee
Standard Will and one LPA	£480	£82	Standard Wills and one LPA each	£745	£164
Standard Will and both LPA's	£730	£164	Standard Wills and both LPA's each	£1195	£328
Advance Planning Will and one LPA	£700	£82	Advance Planning Will and One LPA Each	£850	£164
Advance Planning Will and both LPAs	£950	£164	Advance Planning Will and Both LPA's	£1300	£328

### Additional Products

Additional Trust	£150
Advance Directive (Living Will)	£100
Bespoke Letter of Explanation / Wishes (per will)	£50
Secure Storage of produced documents	£30 (per annum)
Copy documents of produced documents if lost	£15

### Other Planning

In certain circumstances your requirements may be outside of the scope of the fees quoted above. Possible examples of this are listed below and, in these cases, we will provide you of details before proceeding.

- Advice on Trusts for disabled beneficiaries
- Excessive number of legacies (particularly when high in relation to residue)
- Review if existing planning
- Domicile (issues concerning domicile/deemed domicile including when one spouse is non domicile).

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- Complete or Contentious Family circumstances (Inc unequal distribution, excluded beneficiaries, bespoke letter of explanation).
- Agricultural Considerations (Inc review of partnership agreements, consideration of IHT and agricultural relief.
- Complex IHT Considerations and Planning (Inc RNRB, gift of the family home, Charity Inheritance Relief, multiple tax reliefs, NRB of a deceased spouse when the surviving spouse has remarried.

## Fee Details

<b>Pricing for Wills Includes</b>	<b>Standard</b>	<b>Advanced</b>
Executors / Trustees and Substitutions	X	X
Guardians and Substitutions	X	X
Gifts/Legacies	X	X
Gift of Residues (inc multiple beneficiaries)	X	X
Drafting consideration to deal with assets in different jurisdictions (excluding advice in relation to the jurisdiction)	X	X
EU Succession	X	X
Memorandum of Wishes re personal belongings	X	X
Full Bespoke Letter of Advice	X	X
Summary of the will	X	X
Draft Will for review	X	X
Further Draft Wills	X	X
Unlimited calls with adviser within a three month period	X	X
Standard letter of explanation	X	X
Bound final version of will for signing	X	X
Review and checking of will after signing to ensure validity	X	X
One per client of either: Life Interest Trust, Right to reside (occupy), Discretionary Trust, Business Property Relief Trust.		X
Bespoke Letter of Wishes in relation to the trust.		X
Severance of Tenancy if applicable		X

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<b>Pricing for LPAs Includes</b>	<b>Standard</b>
Advising and drafting of the documents	X
Written confirmation of the instructions and advice	X
Issue of documents for signing with full signing instructions and guidance	X
Checking and correction of the instructions and advice	X
Issue of documents for signing with full signing instructions and guidance	X
Checking and correction of any discrepancies with the signing of the documents	X
Pre-registration review of the documents	X
Managing the registration of LPA with the court (Exc court fee, currently £82 per document)	X
Guaranteed successful registration of the document (Unless incorrect information has been provided by the client).	X
Two certified copies of each LPA when requested	X

### **Introducer payments**

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Our fees are the same whether you contact us directly or come through an introducer. We do not pay referral fees. However, where an introducer has arranged the completion of our questionnaires and sent them to us, we pay them a set fee for doing this work on our behalf. This fee is £30.00 for a will questionnaire and £35.00 for one or both LPA questionnaire. This fee is payable by us and not you.

### **Institute of Professional Will Writers (IPW)**

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Hather Financial Services Ltd. are proud to be members of the IPW who authorise our firm and our continuous professional development in the specialist areas of writing wills and power of attorney.

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