

# DIY PROBATE PACK



## **DIY Probate - Quick Start Instructions**

How to *Fast-Track* your Probate Application in 3 quick and easy steps using the *Assisted DIY Probate* method:

- 1. Complete the enclosed 'Confidential Information Form' and Schedule of Assets and Liabilities.** Send these forms, a copy of the Will and the death certificate to: Berkeley Weston Ltd, Business Box, 3 Oswin Road, Leicester LE3 1HR or scan and email to

[phil.weston@berkeleyweston.co.uk](mailto:phil.weston@berkeleyweston.co.uk)

The Probate application paperwork will be completed for you by probate expert Phil Weston's legal team, and then posted out to you for approval.

- 2. Check, sign and return the application paperwork and pay the application fees.**

Upon receipt of the signed paperwork and fees, the application is filed at the Probate Registry Office on your behalf by Phil Weston's legal team.

- 3. Receive the Grant of Probate direct from the Probate Registry.**

It really is that quick and easy!

**Assisted DIY Probate Service**

**Confidential Information Form**

**(To accompany completed 'Assets and Liabilities Form', a copy of the Will and an official copy of the Death Certificate)**

1. Your name & telephone number \_\_\_\_\_
2. Executor(s) Full Name(s)  
\_\_\_\_\_  
\_\_\_\_\_
3. Executor(s) Home  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. Executor(s) Telephone Number \_\_\_\_\_
5. Executor(s) Email address \_\_\_\_\_
6. Executor(s) occupation \_\_\_\_\_
7. Executor's relationship to the deceased person \_\_\_\_\_
8. Deceased person's full name \_\_\_\_\_
9. Deceased person's address \_\_\_\_\_
10. Deceased person's marital status \_\_\_\_\_  
If married, the date of marriage \_\_\_\_\_  
If divorced, the date of divorce \_\_\_\_\_
11. Was the deceased, or his/her immediate family, adopted?  
If Yes, please provide further details  
\_\_\_\_\_  
\_\_\_\_\_
12. Any special comments or instructions  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I wish to apply for the Assisted DIY Probate Service and agree to pay the fee of £750 + VAT within 7 days of receiving a fee invoice (*please do not send payment until confirmation of acceptance issued by Berkeley Weston Ltd*)**

\_\_\_\_\_ SIGNATURE

**Return immediately to:**

Berkeley Weston Ltd  
Business Box  
Oswin Road  
LEICESTER  
LE3 1HR

**Checklist:**

Signed & Completed Confidential Information Form  
Copy Death Certificate  
Completed 'Assets & Liabilities' Form  
Copy Will

Or scan & email this form & accompanying documents to [phil.weston@berkeleyweston.co.uk](mailto:phil.weston@berkeleyweston.co.uk)

## **THE ASSISTED DIY PROBATE SERVICE**

### **DIY Probate Done Properly**

Help is available in obtaining probate through the Assisted DIY Probate Service, administered by Berkeley Weston Ltd. As well as ensuring probate is obtained in the shortest possible time, one of the main functions of this service is to **ensure correct completion of the forms and legal paperwork**, to reduce the prospect of the Executor of the Will making a mistake.

This is a **Fast Track method of obtaining probate** with full help and support.

Another important factor is to give Executor(s) **priority access to practical help and support throughout the probate process**. Clients can access help over the telephone or by email. There are no restrictions on the number of times clients can access the help and support service.

It assists individuals who want complete a successful DIY Probate outcome by taking care of the complicated legal and inheritance tax forms, which is often the biggest stumbling block for individuals doing probate themselves. This leaves the Executor free to concentrate on the straightforward tasks such as dealing with banks, building societies and other interested parties.

Service is provided in a highly confidential and speedy manner. Upon receipt of signed forms, the probate application paperwork is usually filed with the Probate Registry Office the same day.

It is designed to achieve a swift, stress-free and inexpensive DIY probate outcome for clients.

Potential savings when you use the Assisted DIY Probate Service typically add up to £3,000 or more.

All it requires is that a signed confidential information form be completed by the customer and emailed or posted to Berkeley Weston Ltd.

To qualify for the Assisted DIY Probate Service the person applying must be a named Executor in the Will.

The Assisted DIY Probate Service includes the following services to its customers:

1. Identifies the correct inheritance tax form(s) to complete.
2. Checks the estate information is present and correct.
3. Checks the Will for any possible errors or problems.
4. Checks Land Registry records to establish whether a jointly owned property is owned as 'Joint Tenants' or 'Tenants in Common'
5. Completes the HMRC inheritance tax reporting requirements for excepted estates, including 'Return of estate information' form (IHT205) where required\*
6. Completes the 'Claim to transfer unused nil rate band' form (IHT217), if required.
7. Completes the Probate Application Form (PA1)

8. Forwards the probate application paperwork to the executor(s) with instructions for signing.
9. Prepares checks for payment of probate fees to Her Majesty's Courts and Tribunal Service (HMCTS).
10. Forwards the probate application paperwork and fee for filing at the correct Probate Registry Office
11. Orders certified court sealed copies of the Grant of Probate, if the option is desired by the client.
12. Carries out a 'post-probate' telephone consultation with the client to ensure the estate is concluded correctly and any potential costly mistakes avoided.
13. **Unlimited help and support by phone and email throughout the entire probate process.**

Berkeley Weston Ltd has been in business for over 10 years and has helped more than 6,000 clients with their probate requirements.

If you'd like to use the Assisted DIY Probate Service, complete the "confidential information form" on the next page. Or, if you prefer or have any questions, call 0116 2795044 or email [phil.weston@berkeleyweston.co.uk](mailto:phil.weston@berkeleyweston.co.uk)

The fee for the Assisted DIY Probate Service is £750 .00 + VAT (£900 including VAT). **This amount can be reclaimed from the estate** after probate is granted as an expense incurred during the administration period.

\*Please note; if the estate requires completion of a full inheritance tax account IHT400 and you'd like to use the Assisted DIY Probate Service please call 0116 2795044, or email [phil.weston@berkeleyweston.co.uk](mailto:phil.weston@berkeleyweston.co.uk) for a review of your requirements before sending your application.

## **Assisted DIY Probate Service Client Feedback**

“Dear Mr Weston. Thank you very much for your assistance in dealing with probate for my late wife affairs. This was completed last Friday. Your help I found very comforting when it came to dealing with the paperwork, which I found most difficult at the time. But we all have to move on. So once again thank you for taking the weight off my shoulders and help in dealing with the necessary formalities. Kind regards.” **Gerald Hardiman**

“Dear Phil, we would like to thank you for all your hard work and guidance through arranging probate for us. Reading the official forms created a nightmare, but then your great instruction papers arrived with explanations that made sense! Your ideas over the paperwork, the email messages and phone calls were so helpful and so quickly deal with no one could possibly have had better or more efficient help. I can imagine that many people without legal experience, panic when faced with legal matters, like us. However your service, time and help from all directions was wonderful, we couldn't have asked for anything better.” **Jean Wilson and Marilyn Bradley.**

“Hi Phil, I just wanted to say you and your company are OUTSTANDING, PROFESSIONAL, INFORMATIVE, the list goes on.....

Thank you for the excellent service you offer with your DIY Probate pack. I would not hesitate to recommend anyone looking to not hesitate, and maybe like me are a little nervous of all official jargon to USE your ASSISTED DIY PROBATE. You made the process easier and stressless.

You are by far a first class example of how a company should operate and it must be a huge pleasure for all your staff to be working with you.

On behalf of my late husband (who was a very organised man, had details attached to a note book to use your company in the event of his death. I had already downloaded the pack but this just confirmed my choice) and myself I cannot thank you enough and am more than grateful for all your patience and help at this time.

Oh and I must say value for money, an understatement. Amazing value for such a professional service.

Very kind regards” **Anne Charlton**

“Hi Phil, I would like to say how pleased I have been with your service. You have acted quickly and accurately to ensure a fast efficient conclusion to me late father's affairs. Additionally your communication has been first class. Thank you.” **Mike Pitson**

“Hi Phil just to thank you for a successful probate outcome. Your advice and service was absolutely brilliant. We had everything in place as advised by you. I would recommend your company to everyone. Thanks again and you can name me as a recommendation.” **Liz Owen**

“I would like to put forward a recommendation for your company. You have been extremely helpful, whether it be telephone calls or e-mails, by replying promptly and with as much information as you could have. You have kept all of my family well informed every step of the way and have been most generous in answering what were sometimes silly questions. I would thoroughly recommend you and your services to anybody. Many thanks again for all your help.” **Audrey Rourke**