

## Do you have Power of Attorney and the CORRECT Will in place?

Our services are available weekdays during the daytime or evening and include a FREE first meeting either at our office, by video call (Zoom) or telephone to discuss your requirements and our standard recommendations. Chargeable home\* visit meeting(s) are also available (\*within 40 miles of our Chichester Office excluding IOW, restrictions apply, to use our services, you must be over 18 and have capacity).

Estate Planning/Recommendations Report (recommended service S7.1)  can be ordered to show asset protection strategies regarding the threats of Care Costs, Marriage after Death (MAD), Creditors, Bankruptcy, Inheritance Tax (IHT), Divorce, Separation, Business Succession, Generational IHT and Power of Attorney. You can then choose to either accept our recommendation(s) and put all or part of your estate planning solution(s) in place, or provide your own instruction(s) for the work you require.

**S1. Wills** (Double/Couple Will refers to two separate Wills, we do not offer a Mutual Will Service)

	Single	Double/Couple
1.1 Basic Will Includes Commentary and Clarity Statement (S2/S3/S5/S6 may also apply)	£150.00	£250.00

**S2. Additional Clause options to be included in the Will**

	Single	Double/Couple
2.1 Guardianship (child/children under age 18) clause within Will	£30.00	£40.00
2.2 Pets (gift of animal with instruction or legacy) clause within Will	£30.00	£40.00
2.3 Replacement beneficiary clause within Will (if more than 1 person/class is replacement)	£30.00	£40.00
2.4 'Split' multiple beneficiaries within Will (2 or more persons/class splitting the same share)	£30.00	£40.00
2.5 Legacies monetary/bank account/shares etc clause(s) within Will	£30.00	£40.00
2.6 Chattels clause within Will (refer to Expression of Wishes FREE)	£30.00	£40.00
2.7 Funeral additional wishes within Will (cremation/burial or Expression of Wishes FREE)	£30.00	£40.00
2.8 In Anticipation of Marriage clause within Will	£50.00	£70.00
2.9 Gift of UK Property clause within Will (per property)	£50.00	£70.00
2.10 10% Charity clause within Will	£70.00	£100.00
2.11 Gift of Nil Rate Band and/or Residence Nil Rate Band (NRB/RNRB)	£80.00	£120.00
2.12 Digital Assets clause within Will	£80.00	£120.00
2.13 European Property - Brussels IV clause within Will	£100.00	£150.00
2.14 Business clause within Will	£100.00	£150.00
2.15 Non-Provision Declaration clause within Will Note (I(PFD)A1975) see also S6	£100.00	£200.00

### S3. Trusts available within a Standard Will

*Will Trust(s) shown below are printed within a Will*

	Single	Double/Couple
3.1 Children's Trust (age 18)	£60.00	£80.00
3.2 18-25 Young Person Trust (age 18-25)	£70.00	£90.00
3.3 Property Trust (Right to Reside/Life interest/Protective Property Trust)	£500.00	Per individual Trust
3.4 Nil Rate Band (NRB) and/or Residence Nil Rate Band (RNRB) Discretionary Trust	£650.00	Per individual Trust
3.5 Discretionary Trust of Residue and/or Discretionary Trust of Residue (NRB/RNRB)	£650.00	Per individual Trust
3.6 Interest in Possession (IIP) Trust of Residue	£500.00	Per individual Trust
3.7 Disabled Discretionary Trust	£600.00	Per individual Trust
3.8 Business Trust	£400.00	Per individual Trust

### S4. Lasting Powers of Attorney (LPA)

Per Individual Document (unless stated)

4.1 LPA - Property & Financial Affairs <u>OR</u> Health & Welfare (with services 4.5, 4.6 & 4.8)	£500.00
4.2 LPA - Health & Welfare (unregistered, supply only)	£300.00
4.3 LPA - Property & Financial Affairs - Personal Use (unregistered, supply only)	£300.00
4.4 LPA - Property & Financial Affairs - Business Use (unregistered, supply only)	£400.00
4.5 LPA - Certificate Provider Service (SCLS to act as Certificate Provider, if capacity)	£75.00 (or same Donor 2 LPAs £100.00)
4.6 LPA - Sending LPA to Attorney(s) for completion	£50.00 (or same Donor 2 LPAs £75.00)
4.7 LPA - Checking Service (LPA document checking and report)	£75.00 (or same Donor 2 LPAs £100.00)
4.8 LPA - Checking & Registration Service ( <u>excludes</u> any OPG fee currently £82.00)	£95.00 (or same Donor 2 LPAs £175.00)
4.9 LPA - Deed of Revocation	£150.00
4.10 GPA - General Power of Attorney	£150.00
4.11 Advanced Decision	£90.00

Note: 'unregistered' Lasting Power of Attorney (LPA) service is with the Donor on a supply only basis. LPA's must then be signed & witnessed correctly in the right order by the Donor, Certificate Provider and Attorney(s) or the document could fail registration at the Office of the Public Guardian (OPG). LPA's must be registered before the Attorney(s) may use the document; separate fee payable to the Office of the Public Guardian (may) apply.

# South Coast Legal Services Limited

Wills, Trusts, Power of Attorney and Estate Planning

In association with Countrywide Tax & Trust Corporation Ltd

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Services/Price List January 2025

## S5. Severance of Tenancy

5.1 Severance of Tenancy Service (Mutual)	£150.00
5.2 Severance of Tenancy Service (Non-Mutual)	£250.00
5.3 Severance of Tenancy Service (Unequal Shares)	£Refer
5.4 Land Registry Search (free with Trust based Will or chargeable as stand-alone service)	£25.00

## S6. Additional Fees/Services

6.1 Office Meeting - 1 <sup>st</sup> meeting Free (additional meetings at SCLS discretion/refunded off order invoice)	£50.00 per meeting
6.2 Zoom/Telephone - 1 <sup>st</sup> meeting Free (additional meetings at SCLS discretion/refunded off order invoice)	£35.00 per meeting
6.3 Home* visit £50.00 if 1 person attending from SCLS or if 2 persons attending from SCLS	£100.00
6.4 Visit to Hospital/Hospice/Care Home* £125.00 or if 2 persons attending from SCLS	£250.00
6.5 Hourly Rate Adviser £120.00 or Admin £60.00 per hour (if/where applicable)	
6.6 Urgent Service (Will or Lasting Power of Attorney within 7 days of order)	50% Uplift
6.7 Will that could incur a possible inheritance provision claim (I(PFD)A1975)	£50.00 per Will (see also 2.15)
6.8 Letter to Doctor requesting capacity evidence (client is responsible for paying any doctor fees)	£35.00
6.9 Reprint of Document(s) - Price per document	£25.00
6.10 Remote Will Checking Service (Will checking service by post)	£25.00 per Will
6.11 Will Checking Service and Copy of signed Will	£35.00 per Will
6.12 Witness to document (Will/LPA SCLS prepared) - SCLS as 1 witness in office	£25.00 per document (*note 6.3/4)
6.13 Witness to document (Will/LPA SCLS prepared) - SCLS as 2 witnesses in office	£35.00 per document (*note 6.3/4)
6.14 Document Storage (Countrywide) with remote Checking Service (annual direct debit)	From £35.00 per year
6.15 Document Storage and/or Update Service	£Various Options available

## S7. Reports (Legacy Reports - Via Client Portal)

7.1 Estate Planning/Recommendations Report (Single or Couple)	£200.00 Recommended Service <input checked="" type="checkbox"/>
7.2 Confirmation of Instruction(s) Report (Basic Will/Trust Will/Power of Attorney etc)	£Refer

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**Further Services available - in association with Countrywide Tax & Trust Corporation Ltd are shown below**  
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## S8. Wills (Pilot Trust Version)

	Single	Double/Couple
8.1 Will with distribution to separate Pilot Trust(s) - Includes commentary & statement	£Refer	£Refer

## S9. Pilot Trusts Settled by a Will

	Per Individual Trust
<i>Pilot Trust(s) shown below are separate document(s) <u>outside</u> of a Will</i>	£Refer
9.0 Family Trust - Flexible Family Trust - Family Interest in Possession Trust - Family Business Trust plus Business clause in Will - Additional Pilot Trust(s) - Pilot Trust(s) not settled by Will and associated documents	

## S10. Pension Trusts

10.0 Family Pension Death Benefits Trust - Nomination of Pension Death Benefits	£Refer
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## S11. Life Assurance Trusts

11.0 Family Life Assurance Trust - Family Joint Life Assurance Trust	£Refer
Deed of Assignment - Declaration of Trust	

## S12. Probate Preservation Plus Trust - For the principle private residence

12.1 Family Probate Preservation Plus Trust (PPPT) <b>with money back guarantee</b>	£Refer
12.2 Family Probate Preservation Plus Trust (PPPT) <b>without</b> money back guarantee	£Refer

## S13. Other Services *Please ask about additional services available*

Professional Executor/Trustee - Trust Administration - Declaration of Trust - Investment Trust/Family Investment Probate/Gift/Disabled/Personal Injury Trust - Property Services/Conveyancing - Deed of Variation - Business Services - Agreements - Deputyship - Care Guidance - Nuptial Agreements - Change of Name - Parental Responsibility (v250120)	£Refer
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