

Probate Case Study

Mr and Mrs P had been married nearly 60 years when Mr P died suddenly after a very short illness. Mr P had dealt with most of the family finances during the marriage. Luckily they both made up to date Wills.

Mrs P contacted us after her husband died and we offered her the choice of a meeting at our offices or at her home. One of our solicitors visited her at her home and we were able to visit her to offer advice and support.

Mr P had made a Will leaving his estate between Mrs P and the children. The estate was simple and straightforward consisting of bank accounts and some shares. Mrs P asked us to help with the complete probate process. She found it very difficult to deal with paperwork and found the whole process quite daunting.

After the initial interview we were able to help Mrs P to deal with her husband's estate and this took a great weight off her mind. We gave her details of likely fees in writing and she was very happy with the estimate that she received. She helped to provide the information we needed to start the process such as bank statements. We explained to her the steps that we would need to obtain probate and deal with the closing and cashing in of the accounts and investments.

The Grant of Probate was obtained within six weeks of the first meeting and we were then able to deal with the closing, cashing in and transferring of the shares and investments.

Once the accounts had been closed we were able to deal with any income tax and tax issues. We were able to pay the money to Mrs P and give her advice on what changes she might now need to make to her own Will, property and affairs so that she could plan for the future.

Mrs P was delighted to receive a personal, professional service. The whole estate was dealt with very quickly and she was able to choose whether or not to come to the office or have meetings at her home where she felt more comfortable.

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If you require any further information or to make an appointment please contact Hayley.bakes@davidgray.co.uk or call 0191 243 8167