



# Estate Administration or 'Probate'

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## What is estate administration?

**Estate administration is the process of dealing with a person's legal, financial and personal tax affairs after they have died. The process is sometimes referred to as Probate or Confirmation in Scotland.**

All estates need to be administered to some extent. This normally means dealing with all of their assets (such as personal property and personal possessions) and liabilities (such as outstanding debts) before transferring what's left to the beneficiaries.

## What's involved in the process?

If you are named as an Executor in a Will, or the next of kin if there is no Will, you may need to think about the points below. The list is not exhaustive:

- Gathering all information
- Contacting all people due to inherit and dealing with their questions
- Applying for the Grant of Probate
- Closing bank accounts and paying debts
- Ensuring the family tree information is correct
- Dealing with shares and investments
- Completing inheritance tax forms
- Completing Income tax forms
- Dealing with capital gains tax
- Dealing with specialist legal work

## Important considerations if you choose to do it yourself

Dealing with the administration of someone's estate can take many months (not weeks), depending on the complexity of their affairs. If you think you can do it yourself, make sure you can cope with the demands on your time. It can be a long a complex legal process and timescales are different for each and every estate.

If you choose to administer the estate yourself you can reduce costs but you must deal with a lot of paperwork and take on a lot of responsibility. You cannot cut any corners and are legally responsible for meeting all legitimate claims (including tax). If you don't act correctly, you could be sued by one or more of the beneficiaries and become personally liable for the errors.

## What are my options?

You can choose to administer the estate by yourself (and with any other appointed Executor in the the Will) and assume the responsibilities and risks or you may prefer to appoint a specialist legal firm to do the work on your behalf and have complete peace of mind.

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## Why choose us to act for you?

Whether the estate is simple or complex, the issues faced with the death of a loved one are rarely straightforward.

**That's why Duncan Turner Associates has partnered with Kings Court Trust, our preferred provider of estate administration, to deliver an estate administration service.**

Most of us are not used to dealing with the complex requirements of estate administration, especially at a time when financial matters are the last thing on our minds. Kings Court Trust is one of the leading specialist estate administration service providers in the UK and, like us, they place their clients at the very heart of everything they do.

This unique service means you can leave the challenging tasks involved with estate administration to us, all for a **fixed price**. Kings Court Trust will handle everything you can think of and all the things you might not have considered, giving you the time to focus on life's important moments.



**If you would like to discuss estate administration further,  
please contact Tim Turner on  
0115 981 0900 or 0330 311 0910**

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