



Seapoint

Probate Services

We provide a comprehensive service on all aspects of the administration of shares in deceased estates:

- Initial probate valuation
- Additional valuations at other important tax dates
- Active administration of the shares once the Grant of Representation has issued
- Distribution of the shares through sale or transfer to the beneficiaries

We support this service by assessing whether:

- A small estates procedure can be used or
- Any foreign Grants of Representation might be required, in which case we assist and manage their extraction through a network of solicitors and lawyers in the relevant jurisdictions.

We also provide

- An advisory service for US Federal Estate Tax
- Access to a Medallion Stamp Service for US and Canadian shares

We can also carry out:

- Historical research on shareholdings for Capital Gains Tax
- Research into corporate actions
- Tracing of current assets from old share certificates

Probate valuation service

In the UK and Ireland, and where possible elsewhere, we check the quantity of each holding with the registrar at the date of death. We then prepare the valuation using the Revenue approved formula in a format that makes completing the SA2 easier. Our cover letter will mention any differences in the quantities you have provided, corporate actions that might affect the shareholdings, and foreign grants or axes that might apply.

Probate Service for post-grant Administration

When formally noting the death, our basic service includes the following – as well as preparing all the documents for dealing with the relevant registrar:

- Confirming the entire amount of the holding
- Replacing any lost share certificates
- Requesting the registrars replace or re-date uncashed dividends
- Tracing corporate actions
- Small estates advice
- Foreign grant advice

New Schedule of Charges—Effective 1st March 2023

Probate valuations

0.2% of the value of the shares the subject of the valuation + vat

Minimum fee €220 + vat

Research

€180 + vat per hour

Probate service for post grant administration

Professional fee hourly rates

Senior administrator €180 + vat

Junior administrator €120 + vat

Registered Post fee— €20 + vat per item

Transfer of stocks to beneficiaries

€75 + vat per line of stock per beneficiary

Sale of shares

As required by arrangement with your choice of stockbroker

Please note we are introducing a new policy that probate valuations need to have the minimum fee paid up front and if the valuation fee exceeds this we would be obliged if you could then pay the balance at the earliest opportunity. If this causes any difficulty please give me a call.



About Janet O'Byrne

Janet has worked in financial services for over 20 years and has specialised in probate and trusts since 2002. She is a registered stockbroker and a member of the Society of Trust & Estate Practitioners (STEP), which gives her a unique insight into the legal aspects of the administration of shares in estates and trusts. While at Bloxham Stockbrokers she was head of Probate and Trust, a department she built up over a ten-year period. Following the takeover of Bloxham she set up Seapoint Probate Services in 2012. She has regularly lectured on probate at various conferences including the Stephenson Burns Solicitors conferences and has lectured on the Law Society's PPCII course.

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