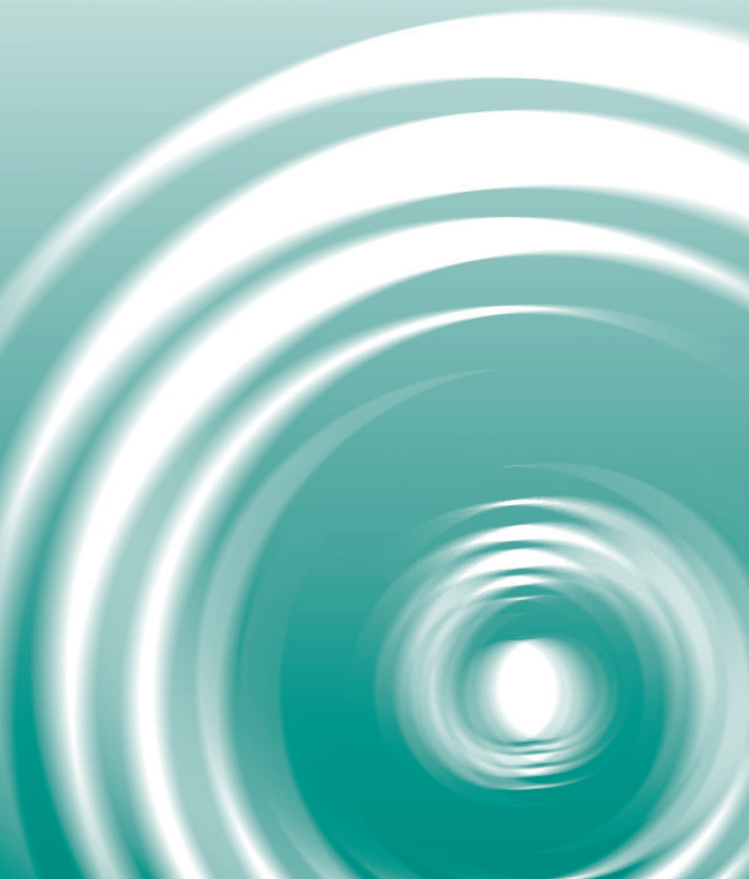




Seapoint  
Probate Services



## Seapoint Probate Services

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

- Initial probate valuation
- Second valuations for important CAT valuation 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 are needed, in which case we can manage their extraction through a network of solicitors and lawyers in the relevant countries.

We also provide:

- an advisory service for US Federal Estate Tax, and
- access to a Medallion Stamp service for US and Canadian stocks.

We can also carry out:

- historical research on shareholdings for CGT purposes
- research into corporate actions, and
- the 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 CA24 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 taxes 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.

## Charges

### Probate valuations

0.2% of the value of the valuation + VAT

Minimum fee € 165 + VAT

### Research

€ 100 + VAT per hour

### Probate service for post grant administration

#### *Professional fee hourly rates*

Senior administrator € 130 + VAT

Junior administrator € 100 + VAT

#### *Minimum fees*

UK and Irish shares:

€ 140 + VAT per line of stock up to five stocks

€ 700 + VAT for over five stocks

Rest of world:

€ 150 + VAT per line of stock

Foreign grant advisory service:

€ 150 + VAT

Sundry fee:

€ 5 + VAT per batch of five stocks

### Transfer of stocks to beneficiaries

€ 75 + VAT per line of stock per beneficiary

### Sale of shares

As required by arrangement



### **About Janet O'Byrne**

Janet has worked in financial services for nearly 20 years and has specialised in probate and trusts since 2002. She is a member of the Chartered Institute of Securities and Investments and of the Society of Trust & Estate Practitioners, 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. She regularly lectures on probate at the Stephenson Solicitors conferences and has lectured on the Law Society's PPCII course.



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