

## FEES LIST

2017

### How to read this list

Many clients only need the services listed in the 'Main Services' section. However, Wills can provide much more in terms of protection from inheritance tax, payment of care fees and dealing with complex family situations by the inclusion of additional clauses and Will trusts. These are listed below 'Main Services' for your information. Your Associate will be happy to discuss them and your specific requirements

<b>MAIN SERVICES</b>	<b>Single £</b>	<b>Mirror £</b>
<b>Basic Single Will</b> <b>Basic Mirror</b> <i>(both including any legacies, and where required trusts for minor children in which assets are kept until they become at least 18 years old or an age you can specify).</i>	<b>195.00</b>	<b>295.00</b>
<b>Lasting Power of Attorney – Property &amp; Financial Affairs</b> <i>A document in which a donor appoints others to manage their financial affairs if &amp; when he/she can no longer do so nor make decisions for themselves. Fees include the role of Certificate Provider who confirms the donor's understanding of the LPA and validates their decision and capacity to make the document.</i>	<b>285.00</b>	<b>405.00</b>
<b>Lasting Power of Attorney – Health &amp; Welfare</b> <i>A document in which a donor appoints others to make health &amp; welfare decisions when he/she is no longer capable of doing so. Fees include the role of Certificate Provider who confirms the donor's understanding of the LPA and validates their decision and capacity to make the document.</i>	<b>285.00</b>	<b>405.00</b>
<b>Both Property &amp; Financial Affairs AND Health &amp; Welfare Lasting Powers of Attorney</b>	<b>430.00</b>	<b>660.00</b>
<b>Registration of a Lasting or Enduring Power of Attorney</b> <i>The documentation required to register a LPA with the Office of the Public Guardian (OPG). PLEASE ADD the OPG registration charge of £110 (or £55 where exemption applies)</i>	<b>235.00 + OPG fee</b>	<b>350.00 + OPG fee</b>
<b>ESSENTIAL Storage</b>	<b>40.00</b>	<b>45.00</b>

### Other clauses, provisions & Will Trusts, which you may benefit from incorporating in your Will(s)

<b>ADDITIONAL WILL TRUSTS: Charges to be added onto the charge for a basic Will.</b>	<b>Single £</b>	<b>Mirror £</b>
<b>Right of Residence</b> <i>A trust which allows a nominated beneficiary to live in a house, which he/she does not own, for a specified period but which gives no rights to the house nor its capital value.</i>	<b>275.00</b>	<b>325.00</b>
<b>Life Interest Trust</b> <i>A trust which passes a house, property or capital to a nominated beneficiary(ies) but which allows a third party to have the benefit of the house, property or income from the invested capital during their life.</i>	<b>320.00</b>	<b>405.00</b>
<b>Discretionary Trust</b> <i>A trust which allows trustees to make decisions, in line with a letter of wishes, about who in a group of nominated beneficiaries (e.g. spouse or children) should receive funds, when and how much.</i>	<b>320.00</b>	<b>405.00</b>
<b>Disabled Discretionary Trust</b> <i>A Discretionary Trust (as above) but drafted to protect the special interests of a disabled beneficiary. The trust is restricted in how it can be used but it enjoys favourable tax treatment.</i>	<b>320.00</b>	<b>405.00</b>
<b>Business &amp; Agricultural Property Relief Trust</b> <i>A trust to maximise the Inheritance Tax reliefs available for qualifying enterprises by placing assets into trust for the use of non-exempt beneficiaries.</i>	<b>695.00</b>	<b>895.00</b>

<b>EXAMPLES OF PACKAGES WHICH CONTAIN SEVERAL SERVICES, PROVIDING YOU WITH COST SAVINGS</b>	<b>Single £</b>	<b>Mirror £</b>
<b>Will and Lasting Power of Attorney (Package 1)</b> <i>This package includes Will(s), one Lasting Power of Attorney (each)</i>	<b>440.00</b>	<b>640.00</b>
<b>Will and Lasting Power of Attorney (Package 2)</b> <i>This package contains Will(s), BOTH Lasting Power of Attorneys (each)</i>	<b>570.00</b>	<b>840.00</b>
<b>Property Protection Trust (Package 1)</b> <i>This package contains Will(s), severance of tenancy and life interest trust for the house.</i>	<b>585.00</b>	<b>705.00</b>
<b>Nil Rate Band Discretionary Trust with Provision for a loan or charge (Package 1)</b> <i>Wills &amp; trusts with powers allowing trustees to receive an IOU/charge to a beneficiary. The loan or charge is repayable on death. Includes Will(s) and severance of tenancy.</i>		<b>965.00</b>
<b>Flexible Life Interest Trust (Package 1)</b> <i>A life interest trust but with flexibility to allow trustees to gift assets to nominated beneficiary(ies) or to set up another trust. Includes Will(s) and severance of tenancy.</i>		<b>1195.00</b>
<b>MISCELLANEOUS SERVICES</b>		
<b>Advance Decision (Living Will)</b> <i>A less costly alternative to a LPA (HW) in which a person sets out decisions about treatment which he/she may wish to receive or refuse and to appoint others to make later decisions for them in uncertain circumstances when he/she is unable to do so.</i>	<b>115.00</b>	<b>195.00</b>
<b>Parental Responsibility Agreement</b> <i>A document enabling an unmarried mother to give parental responsibility to the unmarried father of their child (born before 1st December 2003. Price per child.</i>	<b>89.00</b>	
<b>Update to existing APS / Simply Legal Will</b> <i>A re-write to encapsulate minor changes to an existing APS / Simply Legal Will (Note – this is not available where wholesale changes are required).</i>	<b>90.00</b>	<b>125.00</b>
<b>Letter of Wishes</b> <i>A letter written by APS / Simply Legal intended to advise executors and / or trustees of the clients intentions in relation to management of trusts or disposal of estate. This is not legally binding</i>	<b>20.00</b>	<b>25.00</b>
<b>Severance of Tenancy - Mutual or unilateral Severance of Joint Tenancy</b> <i>A Deed of Severance with Land Registry search, documentation &amp; registration that enables joint owners of a house to change the ownership from joint tenancy to tenants in common so they can gift their separate share of the house to those they wish to benefit (where unregistered land advice is to register the house with Land Registry).</i>	<b>135.00</b>	
<b>Declaration of Trust*</b> <i>A document stating who has a financial interest in a house and in what proportions, e.g. a child may loan or gift capital to parent to buy house and this needs to be documented to allow recovery of the value when house is sold. NOTE: disbursements may be required.</i>	<b>340.00</b>	
<b>Urgent drafting fee</b> <i>An additional fee where documents are needed as soon as is practical in circumstances such as upcoming holidays. This does not apply to clients suffering medical conditions.</i>	<b>30.00</b>	<b>30.00</b>
<b>Will Retrieval Free</b>	<b>20.00</b>	<b>40.00</b>

\* Additional 3<sup>rd</sup> party fees (for example Land Registry fees) applicable

<b>LIFETIME TRUSTS</b>	<b>Single £</b>	<b>Mirror £</b>
<b>Pilot Trust</b> <i>A trust set up by a settlor in life (with minimal assets put into it e.g. £10) which receives other assets after the death of the settlor as specified by their Will.</i>	<b>1095.00</b>	<b>1750.00</b>
<b>Asset Protection Trust</b> <i>A trust established in which to shelter property and cash from the time of its assignment to the trust subject to Inheritance Tax rules. It may also be appropriate for protecting the value of a home from care fees.</i>	<b>2475.00</b>	<b>3275.00</b>
<b>Spousal Bypass Trust</b> <i>A trust set up by a settlor in life into which the proceeds from an occupational death-in-service policy or life insurance policy are paid.</i>	<b>1295.00</b>	<b>1995.00</b>

On behalf of APS Legal & Associates Limited, Head office: Worksop Turbine Innovation Centre, Shireoaks Triangle Business Park, Coach Close, Worksop, Nottinghamshire, S81 8AP. APS Legal & Associates Limited is a member of the Institute of Professional Willwriters and complies with the Trading Standards Institute approved IPW Code of Practice.



**Please make payments for all fees to your Associate who will invoice you.  
Payments can be made by cheque, credit or debit card.**