

# Estate Planning Services

Service and Package Fees

pruWardWilliams

# Estate Planning Plan with confidence

Estate planning goes beyond passing on wealth. It's about looking after the people you care about, protecting what you've worked hard to build, and feeling confident about the future.

With the right advice in place, estate planning can help you protect your family and assets, support your business where needed, and ensure your wishes are clearly reflected in the legacy you leave behind. At Ward Williams, we provide expert estate and tax planning advice to individuals, families and business owners. Our approach is personal, thoughtful and practical, ensuring your affairs are structured clearly and efficiently, both now and for the future.

Whether you need a straightforward Will, advice on Inheritance Tax, or a comprehensive estate plan, our experienced team will provide clear, professional guidance tailored to your individual circumstances, helping you make informed decisions at every stage.

As Chartered Accountants and members of the Institute of Chartered Accountants in England and Wales (ICAEW), you can trust us to combine technical expertise with a caring, bespoke approach so you can plan with confidence.

## Our Fees

We believe that clear advice should come with clear and transparent fees. Understanding costs from the outset allows you to plan with confidence and make informed decisions about the support that is right for you.

Our fees reflect the level of expertise, care and time involved in providing tailored estate planning advice. Every client's circumstances are different, and we take the time to understand your objectives before recommending the most appropriate approach.

Where possible, we will agree fees with you in advance and explain what is included, so there are no surprises. If your needs change or additional work is required, we will always discuss this with you before proceeding.

The following pages set out our standard fees and fee ranges. These are intended as a guide, and we will be happy to provide a personalised quote based on your individual circumstances.

# Service and Package Fees

## Trusts

We offer a range of trust planning solutions designed to protect assets, provide flexibility and support effective inheritance tax planning. Our advice is tailored to your personal, family and business circumstances, ensuring the most appropriate trust structure is put in place.

### Discretionary Trusts (Lifetime Trusts)

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**Fees from £3,000 +VAT**

A discretionary trust is a flexible trust arrangement created during your lifetime, under which assets are held by trustees and distributed in line with your wishes. This structure allows a variety of estate planning and asset protection solutions to sit within one overarching framework.

**Discretionary Trusts may include:**

**Asset Protection Trust:**

Helps safeguard assets from future personal or financial risks.

**Asset and Family Protection Trust:**

Designed to protect family wealth while allowing flexibility as circumstances change.

**Business Property Relief (BPR) Trust:**

Used to hold qualifying business assets in a tax-efficient way, helping to preserve inheritance tax relief.

**Pilot Trust:** Established during your lifetime to provide flexibility for future estate and inheritance tax planning.

**Young Persons Trust (Ages 18–25):**

Allows assets to be managed for younger beneficiaries, with access introduced gradually as they mature.

**Vulnerable Persons Trust:** Structured to protect the interests of a vulnerable beneficiary while maintaining access to available tax advantages.

### Will Trusts (On Death)

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**Fees from £3,000 +VAT**

A Will trust is created through your Will and comes into effect on death, allowing assets to be managed and distributed in a controlled and tax-efficient way in accordance with your wishes.

**Will Trusts may include:**

**Discretionary Will Trust:**

Provides flexibility for trustees to distribute assets in response to beneficiaries' changing needs.

**Asset Protection Will Trust:**

Designed to protect inherited assets and preserve them for future generations.

**Business Property Relief (BPR) Will Trust:**

Helps ensure qualifying business assets pass in a tax-efficient manner while preserving available reliefs.

**Trusts for Young or Vulnerable Beneficiaries:**

Allows assets to be held and managed where beneficiaries may not yet be ready or able to manage them themselves.

# Wills

## Single Will

Suitable for single people, this Will allows you to ensure that the right people receive the things you want to leave them.

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**Fees from £300 +VAT**

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## Mirror Will

Ideal for married couples or registered civil partners who wish to leave all their assets to each other.

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**Fees from £540 +VAT**

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## Codicils

Codicils are amendments that can be made to your existing Will. A maximum of three simple amendments can be made before we recommend the Will needs to be re-written.

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**Fees from £180 +VAT**

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## Letter of Wishes

A Letter of Wishes is a document that accompanies your Will. It is not legally binding but can guide your executors and trustees to ensure your personal wishes are carried out.

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**Fees from £180 +VAT**

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# Lasting Powers of Attorney

A Lasting Power of Attorney (LPA) allows you to choose trusted people to make decisions for you if you are no longer able to do so. Where we refer to you and your partner, includes married couples and registered civil partners.

## Health and Welfare\*

A Lasting Power of Attorney for Health and Welfare\* allows you to choose the person or people who can make decisions about your health and personal welfare if you no longer have capacity.

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**For you**

Fees from £330 +VAT

**For you and your partner**

Fees from £660 +VAT

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## Property and Financial Affairs\*

A Lasting Power of Attorney for Property and Financial Affairs\* allows you to appoint the person or people who will manage your financial affairs and property if you become unable to do so.

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**For you**

Fees from £330 +VAT

**For you and your partner**

Fees from £660 +VAT

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## Combined Lasting Powers of Attorney\*

This package brings together both a Lasting Power of Attorney for Health and Welfare and a Lasting Power of Attorney for Property and Financial Affairs, providing a joined-up approach to future decision-making. It ensures that trusted people are in place to look after both your personal wellbeing and your financial affairs, helping to give you and your family peace of mind.

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**For you**

Fees from £600 +VAT

**For you and your partner**

Fees from £1200 +VAT

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\* **Please note**, the Office of the Public Guardian charge an additional £82.00 Court Registration Fee per person, per document. If payment is not made when requested by the Office of the Public Guardian and your application is returned to us as unpaid, there will be an additional charge of £150+VAT per hour, paid to Ward Williams, based on time spent per application for the additional administration required to reapply.

# Estate Planning Packages

## Wills and Lasting Powers of Attorney – Combined Services

These combined services offer a straightforward and cost-effective way to put essential estate planning documents in place, ensuring your wishes are clearly recorded and aligned.

### For you

#### Single Will & Combined Lasting Powers of Attorney\*

This package includes a Single Will together with both a Lasting Power of Attorney for Health and Welfare and a Lasting Power of Attorney for Property and Financial Affairs.

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Fees from £900 +VAT

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### For you and your partner

#### Mirror Will & Combined Lasting Powers of Attorney\*

Designed for married couples and registered civil partners, this package includes Mirror Wills for you and your partner, together with both a Lasting Power of Attorney for Health and Welfare and a Lasting Power of Attorney for Property and Financial Affairs for each of you.

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Fees from £1,740 +VAT

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\* **Please note**, the Office of the Public Guardian charge an additional £82.00 Court Registration Fee per person, per document. If payment is not made when requested by the Office of the Public Guardian and your application is returned to us as unpaid, there will be an additional charge of £150+VAT per hour, paid to Ward Williams, based on time spent per application for the additional administration required to reapply.

# Legal Support

## Severance of Joint Tenancy

A severance of tenancy refers to the legal process by which joint tenants of a property can change their joint tenancy into a tenancy in common. This process allows one or more of the owners to separate their share from the joint ownership without the consent of the other owners.

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Fees to be agreed based on individual circumstances

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## Support beyond planning

While Estate Planning focuses on preparing for the future, there will also come a time when an estate needs to be administered. We help executors and families deal with the practical, legal and tax responsibilities that arise after someone has died, including Probate and Inheritance Tax, handling matters with care, clarity and professionalism.

If you would like to know more about our estate administration services, please get in touch.

## Weybridge Office

Belgrave House,  
39-43 Monument Hill,  
Weybridge, Surrey, KT13 8RN  
Telephone: +44 (0)1932 830 664

## Uxbridge Office

Bay Lodge  
36 Harefield Road,  
Uxbridge, Middlesex, UB8 1PH  
Telephone: +44 (0)1895 236 335

## Sunninghill Office

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London Road, Sunninghill,  
Ascot, Berkshire, SL5 0PY  
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Ward Williams Limited (trading as Ward Williams).  
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