F&T Farley & Thompson
STOCKBROKERS

Professional Partners
Estate and Probate Service

Using our years of experience to provide you with a timely and accurate service

- **Probate valuations**
- **Dividend schedules**
- **Estate sales**
- **In specie distributions**
- **A clear and competitive charging structure**
- **Free initial consultation to beneficiaries**
- **Advisory service**
- **Discretionary management**

At Farley & Thompson we have been working in partnership with local and regional solicitors for a number of years.

As a firm we recognise that your client is important to you and our avowed intent in all matters is to support the relationship you share with your client.

We know that the administration of estates containing shareholdings can be a time-consuming process. Our experienced Probate team with extensive resources is able to provide you with a comprehensive and efficient Estate and Probate service to reduce your workload and provide a 'one-stop-shop' for the validation, valuation, administration and dealing in shares left as part of an estate.

We operate a straightforward and competitively priced in-house service compliant with HMRC regulations and if required, we are happy to attend meetings at your office or your client's home to help with the administration process. Alternatively we are happy to make available the meeting room at our office.

As well as assisting you with winding up the estate, Farley & Thompson operate a range of investment services. We will be happy to offer a free initial consultation to the trustees or beneficiaries with a view to providing investment advice or portfolio management longer term.

For those wanting to make their own decisions we operate an advisory nominee service in which all the administration regarding the shares is dealt with by us. We will offer advice and clients receive six-monthly valuations and end of year tax information.

For those inheriting a portfolio but who do do not wish to choose the individual constituents themselves, we can undertake the management on a discretionary basis making sure firstly that we understand the objectives and attitude to investment risk.

If you are interested in our Estate and Probate Service and would like to know more, please contact Martin Poole or Nicholas Chetwood.

At every stage we will provide you and your client with professional guidance

Farley & Thompson LLP Pine Grange Bath Road Bournemouth BH1 2NU Tel: 01202 295000 www.farleyandthompson.co.uk
Member of the London Stock Exchange. Authorised and regulated by the Financial Conduct Authority 04/16