Farley & Thompson
STOCKBROKERS

Authorised and regulated by the Financial Conduct Authority
Member of the London Stock Exchange

Estate and Probate Service

Help and support for you from our experienced probate team

We can help you with:

- **Probate valuation**
- **Estate sales**
- **Share certificates**
- **In specie distributions**
- **Advisory and Discretionary portfolio management**

Do you need a solicitor?

We will be happy to introduce you to one of our professional connections.

Are you just looking to sell shares?

If you are an executor and already have Grant of Probate we can provide you with a simple dealing service.

At this difficult time Farley & Thompson is ready to help and guide you through the process of being an Executor and dealing with shares left by a loved one.

We are able to provide you with a comprehensive service to help you verify and value the holdings to comply with HMRC requirements so that you can obtain a Grant of Probate. Subject to the appropriate agreements being in place we may also be able to advise on raising money for legacies and the effective use of estate allowances.

Even if you have incomplete or out of date paperwork we can often help you validate the shareholdings and point you in the right direction to obtain the necessary documentation.

As part of our service we will provide you with:

- Confirmation of shareholdings at date of death
- Valuation of shareholdings and any income due at date of death
- Registration of death and/or Probate with the Company Registrars
- Information on any discrepancies, name changes or company reorganisations
- Help to obtain replacement share certificates
- Preparation of documentation for the sale of certificated and electronically-held shareholdings
- Advice on any stocks where a corporate action arises during the probate process
- Disposal and/or transfer of the shareholdings on behalf of the Executors

For beneficiaries inheriting a portfolio of shares we are happy to arrange a no-obligation meeting to discuss the options for ongoing investment advice or placing the account under our discretionary management service.

Full details of our charges can be found on the Estate and Probate Service schedule of fees and commissions.

For further information please contact one of our broking team.