Farley & Thompson
STOCKBROKERS AND INVESTMENT MANAGERS

Professional Partners - Estate & Probate Service

We are highly experienced probate team using years of experience to provide solutions for you and your client and one of the few remaining firms to deal with physical share certificates.

At Farley & Thompson we have been working in partnership with local and regional solicitors, accountants and financial advisors 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 will help you with:

- **Probate valuations**
- **Communicating with registrars**
- **Share certificates or electronic holdings**
- **Unclaimed dividends and corporate events**
- **Estate sales**
- **In specie distributions**
- **A free initial consultation for beneficiaries**
- **A clear and competitive charging structure**

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 rooms 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 services longer term, regardless of value.

For those who like 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 a dealing service with clients receiving six-monthly valuations and end of year tax information.

For those inheriting cash or a share portfolio over £50,000 but who 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 of the new shareholder.

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 and a timely service.

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