

Client Estate & Probate Service

At a time of bereavement we know that undertaking the duties of an executor and administering an estate containing shareholdings can be overwhelming and a time-consuming process.

Our experienced Probate team with extensive resources is able to provide you with a comprehensive and efficient service, a 'one-stop-shop' for the validation, valuation, administration and dealing in shares left as part of an estate.

The service includes:

- Confirmation of all shareholdings at date of death
- Information on any discrepancies, name changes or company reorganisations
- Formal valuation of shareholdings and any dividend or interest income due at date of death
- Registration of death with the company registrars
- Collection of unclaimed or reissued dividends
- Help to obtain indemnities for any missing certificates
- Preparation of documentation for the sale of certificated or electronic shareholdings
- The provision of advice on any stocks where a corporate action arises during the probate process

If the deceased left a Will you will be issued with a Grant of Probate, the legal document required to enable the estate to be distributed. Where the deceased died without leaving a Will (intestate), you will receive a Grant of Letters of Administration.

Once the Grant has been registered, we will be able to undertake the sale of shareholdings on behalf of the executors or assist with the in-specie transfer from the deceased to the beneficiaries.

As well as assisting with winding up the estate, Farley & Thompson operate a range of investment services. We will be happy to offer a free initial consultation to 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.

At every stage we will provide you with professional guidance and if you would like to hear more about these services, please contact us for further information.