

Professional partners

ESTATE & PROBATE SERVICE

Farley & Thompson has a highly-experienced in-house probate team, ready to leverage years of experience to provide solutions for you and your client. We are also one of the few remaining firms capable of dealing with physical share certificates.

How can we support you?

Farley & Thompson has been working in partnership with local and regional solicitors, accountants and financial advisers for a number of years. As a firm with a wide-ranging customer base of our own, we understand how important your client relationship is to you. Our foremost goal is to provide you with the help and resources you need to nurture that relationship.

We know that the administration of estates containing share-holdings can be a time-consuming process. Our Estate & Probate service provides you with an experienced in-house team with extensive resources — a “one-stop shop” to reduce your workload and support your client with validation, valuation, administration and dealing in shares left as part of an estate.

What does the service include?

- ≈ 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, fully compliant with HMRC regulations. If required, we are happy to attend meetings at your office, or your client's home, in order to help with the administration process. Alternatively, we can provide you with meeting rooms here at our office.

What other services do we provide?

As well as helping you to wind up the estate, Farley & Thompson operates a range of advisory and discretionary investment services. We are happy to offer a free initial consultation to the trustees or beneficiaries, with a view to providing investment advice or portfolio management over the longer term.

At every stage, we will provide you and your client with professional guidance and a timely service.

Contact us

If you would like to find out more about the professional partners — estate & probate service, our investment team will be happy to answer your questions or arrange an introductory meeting to present the service in more detail.

☎ 01202 295000

✉ enquiries@farleyandthompson.co.uk