

Lifetime Trusts and Other Planning Fee Schedule

Fee Guide

	Fees excl Vat	Fees incl Vat
Creation of life Trusts including Discretionary and Interest in Possession Trust	£1695	£2034
Deed of Appointment/Retirement of Trustees	£ 595	£ 714
Deed of Appointment of Trust assets	£ 795	£ 954
Deed of Variation	£ 995	£1194
Deed of Variation – Incorporating a Trust	£1495	£1794

Fee Details

- Fees are for a guide and will depend on your personal circumstances and the legal advice that will be required.
- A fee estimate will be provided before commencing work.
- Free lifetime storage of the original documents is provided, in our offsite secure storage facility.
- Additional things that may increase fees include:
 - More than 2 Trustees
 - Trustees or Beneficiaries aboard
 - More than 2 Beneficiaries when appointing out trust asset.
 - Incomplete documentation
 - If you require us to arrange the registration of the Trust

Time Estimates

- We will aim to provide draft documents to you within 15 workdays of your full instruction and all requested documentation being received.
- Documents will be sent for signing with in 5 workdays of your approval of the draft documents.
- Storage details of the original documents will be confirmed to you within 5 working days of receipt of the final signed documents and completion of the file.

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