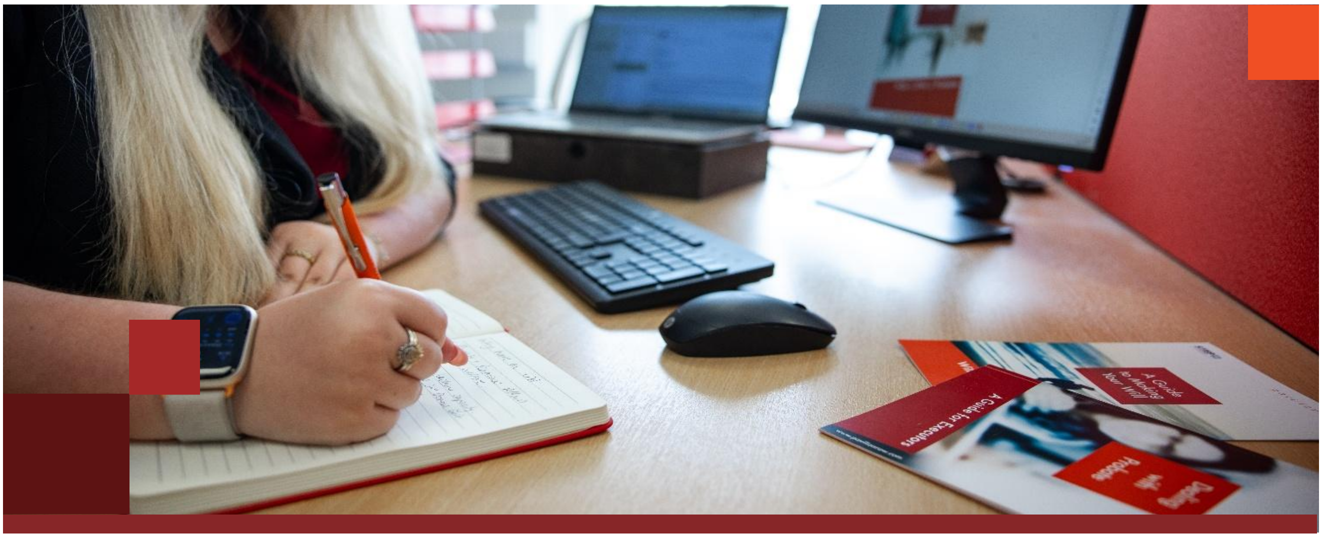
Pavilion Row Estate Administration Service

Information for One Four Nine



Who is Pavilion Row?

Pavilion Row is a specialist regulated Private Client law firm, partnering with wealth managers to deliver joined-up estate and succession planning. Our estate administration service combines expert probate support with a collaborative approach, helping clients navigate a difficult time while keeping you connected to the relationship.

proactive communication | dedicated contact | collaborative approach

Why should you refer to Pavilion Row?

- **Accountable Service** for both you and your client.
- **Clear communication:** ensuring you remain fully informed throughout.
- **Client-focused approach:** reflected in our outstanding reviews and reputation.
- **Proactive Updates:** to help you identify and respond to your client's wider financial needs.
- **Collaborative approach:** a team trained to understand when to involve you to achieve the best outcomes for your client.

Why should your clients use Pavilion Row?

- **Fixed fee:** based solely on the work that needs to be done. No hourly rates or percentages.
- **Personal Contact:** A named qualified probate practitioner who will be your main point of contact throughout the matter. No call centres or sales consultants.
- **Interest Paid:** interest earned on estate funds held in our client account is paid to the estate, with no hidden opt-out clauses.
- **Proactive distributions:** funds paid to beneficiaries promptly, ensuring estate monies are not held longer than necessary.

A Few Questions We Often Hear

What are your fees?

We provide a fixed fee, based on the make-up of the estate, example of our fees can be found on our microsite for One Four Nine. For a quote, just complete our probate questionnaire with your client, alternatively we are happy to contact your client directly to gather the information.

Does the fixed fee ever change?

On a rare occasion if unforeseen complexities arise such as missing assets lengthy HMRC queries, or contentious issue arises then we may need to increase our fees. However, this will be proactively discuss this with the client before any further work commences.

Do you provide a referral fee?

No. Instead, we focus on providing competitive, transparent fees, excellent client service and a collaborative approach that supports both you and your clients. Where the deceased's last Will was prepared by us, we offer a 10% fee reduction to reflect our existing knowledge of the matter and the efficiencies this can create.

When will funds be distributed to the beneficiaries?

On average an estate takes between 6 to 12 months to complete. This will depend on things such as first death/second death, type of assets, taxable or non-taxable etc. However, we will always look to do interim distributions as soon as we can.   Interest earned on client funds is paid directly to the client so there is no incentive for us to hold the money any longer than necessary. We will always advise you when funds are being released.

Where might you involve me with financial decisions?

There are stages through the process where we may advise the executors to speak to you as the financial adviser. These may include decisions regarding the best options for raising funds for payment of inheritance tax or most appropriate assets to encash for legacy payments etc.

In what other circumstances might I be required for financial service advice?

When administering an estate there are a number of circumstances where financial service advice maybe needed e.g. assets liquidated, such as property, and therefore funds becoming available for investing, beneficiaries requiring investment advice following inheritance or investment needs for a trust created by the Will. Often there are also opportunities around inheritance tax planning for the next generation with options such as Deed of Variation into a Trust.

Wills & LPAs

Protecting Your Clients' financial plans with the Right Will.

Probate

Protecting Your Client Relationships Through Expert Estate Administration.

Trusts

Legal expertise to support the planning behind your advice.