



Cave & Sons

Stockbroking & Investments Since 1906

Probate Services

www.caves.co.uk

At Cave & Sons, we have been providing probate valuations to both local and national law firms for many years and have the experience to handle even the most complex of cases.

For a fast, efficient and accurate valuation of investments for probate purposes, why use anyone else?

Even if all you have is a suitcase full of tatty old share certificates or tax vouchers, we can help. As well as fast turn-around times, we also offer a highly trained in-house team to help with your queries.

Our valuations are designed to conform to HMRC requirements for probate and inheritance tax valuations, and include undistributed dividends and interest, to provide a comprehensive service.

We are also able to add value by undertaking the leg work with which you may prefer not to become involved. Verifying holdings, applying for letters of indemnity and registering the grant of probate/letters of administration with company registrars are all services we provide.

For added convenience, payment of fees for work completed can often be from any subsequent sale proceeds.

For further information please call our probate services team on 01604 621 421 or visit www.caves.co.uk

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| Certified, Retrospective and Ad-hoc Valuations | The greater of £7.50 per line or 0.15% of the total value (Minimum £100) |
| Explanatory notes on valuation as required | Up to £10 per item |
| Verification of shareholdings | £15 per item |
| Registration of Death or Probate | £12.50 per holding subject to a maximum of £50 per individual registrar |
| Obtaining replacement share certificates | £50 per holding plus any bank or registrar fees |
| Indemnity countersignatures (for large value holdings) | Details of this service are available on request |
| Transfer of beneficial ownership via registrars | Minimum of £30 per holding (plus stamp duty where applicable) |
| Transfer of beneficial ownership (electronic transfer) | £20 per holding |
| Small estates application | £30 per holding |
| Reissuing dividend cheques | £30 for each letter of request |
| Dividend statements | £50 per registrar |
| Additional work (notified in advance) | £120 per hour (charged in 15 minute increments) |
| Dealing with internationally registered holdings | Details of this service are available on request. Please note that we are only able to deal with such holdings as part of a wider estate and are unable to undertake this work on a standalone basis |

All charges subject to VAT where applicable

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