

# INTRODUCTION TO PRICE TRANSPARENCY AT BTMK

**BTMK**  
SOLICITORS

**BTMK**  
GOODSON

**BTMK**  
MARCUS BAUM

**BTMK**  
TODMANS

**BTMK**  
ALAN SIMPSON



Here at BTMK Solicitors we have always prided ourselves on our jargon-free and transparent approach to our work. In fact, for conveyancing work, which includes the buying and selling of residential property including re-mortgages, we have been using our online pricing calculator now for over 7 years to give our clients up-front information about the costs associated with buying and selling a property.

Get an instant conveyancing quote [here](#).

We feel it's really important, in addition to providing you with an excellent service, that you know what you will pay for the service you expect to receive.

Below you'll find some of our prices for certain aspects of the work that we do, namely

- Undisputed business to business debt up to a value of £100,000
- Claims for unfair dismissal
- Conveyancing charges for buying, selling and re-mortgaging property
- Uncontested probate work with all assets in the UK

Please be aware that we have shown a broad range of possible costs to give you the very best idea of the minimum & maximum fees.

However, all work that BTMK undertakes is based on a number of factors, which include:

- How urgent the matter is and how quickly you would like it dealt with
- Whether the matter is disputed or not
- How complex or simple the matter is
- Whether there is any international aspect
- Any exceptional circumstances
- The particular individual or individuals at BTMK that you would like to deal with the matter
- The level of seniority of the person who may deal with the matter

Because of this we offer a free initial consultation or quote, to discuss your own individual circumstances so we can provide you with a far more accurate quotation.

So our best advice is to contact us directly on **03300 585 222** or at **info@btmk.co.uk**

## KEY TERMINOLOGY

### **DISBURSEMENTS**

A disbursement is defined as a payment that has to be made to a third party for a service provided or for a statutory required action; for example, local authority searches or land registry fees, Court fees or other payments made to third parties on your behalf. These payments are not part of the solicitor's fee for carrying out your legal work; specifically in conveyancing transactions, disbursements are costs related to your matter that are payable to third parties, such as Land Registry fees. We handle the payment of the disbursements on your behalf to ensure a smoother process.

### **VAT**

All of our fees below are stated to be exclusive of VAT. VAT is a tax that is added to the price of goods or services. VAT is an abbreviation for 'value added tax'. We set out next to our prices or estimates of prices the likely level of VAT to be charged but this is always subject to the rate being changed by law; currently VAT is charged at 20%.

### **BTMK**

The businesses of BTMK Solicitors Ltd trading as BTMK, BTMK Goodson, BTMK Marcus Baum, BTMK Todmans or BTMK Alan Simpson.

# UNDISPUTED DEBT RECOVERY

These costs apply where your claim is in relation to an unpaid invoice which is not disputed and enforcement action is not needed. If the other party disputes your claim at any point, we will discuss any further work required and provide you with revised advice about costs if necessary, which could be on a fixed fee (e.g. if a one off letter is required), or an hourly rate if more extensive work is needed.

<b>Debt Value</b>	<b>Court Fee</b>	<b>Plus</b>	<b>Our fee (excl VAT)</b>
Up to £5,000	Between £35-£205		£660
£5,001 – £10,000	£455		£1,100
£10,001 – £50,000	5% value of the claim		£2,200
£50,001 – £100,000	5% value of the claim		£2,750

Anyone wishing to proceed with a claim should note that:

- The VAT element of our fee cannot be reclaimed from your debtor (unless you are not VAT registered);
- Interest and compensation may take the debt into a higher banding, with a higher cost.
- The costs quoted above are not for matters where enforcement action, such as the bailiff, is needed to collect your debt.

Our fee includes:

- Taking your instructions and reviewing documentation
- Undertaking appropriate searches but does not include disbursements if chargeable which are usually in the region of £100 plus VAT for a basic credit or financial search
- Sending a letter before action
- Receiving payment and sending onto you, or if the debt is not paid, drafting and issuing claim
- Where no Acknowledgment of Service or Defence is received, applying to the court to enter Judgment in default
- When Judgment in default is received, write to the other side to request payment
- If payment is not received within 21 days, providing you with advice on next steps and likely costs

Matters usually take 3-5 weeks from receipt of instructions from you to receipt of payment from the other side, depending on whether or not it is necessary to issue a claim. This is on the basis that the other side pays promptly on receipt of Judgment in default. If enforcement action is needed, the matter will take longer to resolve and if the matter is disputed it could be 9-12 months before a Judgment may be obtained.

# LITIGATION TEAM AND EXPERIENCE

Name	Position at BTMK	Qualifications	Relevant Experience
Adam Fleming	Director	Solicitor of the senior courts Admitted 15/9/2008	15 years of litigation and debt recovery experience
Fiona McAnaw	Director	Solicitor of the senior courts Admitted 2/9/2022	20 years of employment and litigation experience
Makayla Phillips	Solicitor	Solicitor Admitted 1/9/2016	7 years of litigation and insolvency experience
Gabriella Shepherd	Solicitor	Solicitor Admitted 2/1/2020	4.5 years of litigation and debt recovery experience (Qualified as a solicitor January 2020)
Samantha Hyslop	Solicitor	Solicitor Admitted 1/9/2021	3.5 years of experience working in employment, civil litigation and debt recovery. (Qualified as a solicitor September 2021)
Emily Aylott	Apprentice Solicitor		18 months of experience working in debt recovery and litigation. Became an apprentice solicitor September 2020

## CLAIM FOR WRONGFUL DISMISSAL

**Simple case:** £3,300-£4,400 (excluding VAT)

**Medium complexity case:** £4,400-£6,600 (excluding VAT)

**High complexity case:** upwards of £6,600 (excluding VAT) depending on the complexity of the matter.

Factors that could make a case more complex:

- If it is necessary to make or defend applications to amend claims or to provide further information about an existing claim
- Defending claims that are brought by litigants in person
- Making or defending a costs application
- Complex preliminary issues such as whether the claimant is disabled (if this is not agreed by the parties)
- If a preliminary hearing is required
- Making an application for a provisional decision given during the course of a legal action.
- The number of witnesses and documents
- If there are also allegations of unfair dismissal or discrimination
- If there is more than one potential Respondent e.g. in the case of a dismissal resulting from a transfer of the business or a part of it.

There will be an additional charge for attending a Tribunal Hearing of £1,000 per day (excluding VAT). Generally, we would allow 1 hour to 1 day depending on the complexity of your case.

Cost estimates may vary depending upon the needs of the client, any Employment Tribunal directions, and the conduct of any other party to the proceedings. We reserve the right to exceed these fee estimates where required.

## **DISBURSEMENTS**

Disbursements are costs related to your matter that are payable to third parties, such as court fees. We handle the payment of the disbursements on your behalf to ensure a smoother process.

Counsel's fees estimated between £750 to £3,500 per day (excluding VAT) (depending on experience of the advocate) for attending a Tribunal Hearing (including preparation). If a hearing lasts for more than one day, the fee for preparation and the first day is usually higher than the fee for subsequent days.

## **KEY STAGES**

The fees set out above cover all of the work in relation to the following key stages of a claim:

- Taking your initial instructions, reviewing the papers and advising you on merits and likely compensation (this is likely to be revisited throughout the matter and subject to change). You may have other options available to you for funding a Tribunal claim, e.g. cover under an insurance policy. We will discuss these options at our first meeting to check whether any apply to you.
- Entering into pre-claim conciliation where this is mandatory to explore whether a settlement can be reached;
- Preparing claim or response
- Reviewing and advising on claim or response from other party
- Exploring settlement and negotiating settlement throughout the process
- Preparing or considering a schedule of loss
- Preparing for (and attending) a Preliminary Hearing
- Exchanging documents with the other party and agreeing a bundle of documents
- Taking witness statements, drafting statements and agreeing their content with witnesses
- Preparing bundle of documents
- Reviewing and advising on the other party's witness statements
- Agreeing a list of issues, a chronology and/or cast list
- Preparation and attendance at Final Hearing, including instructions to Counsel

The stages set out above are an indication and if some of stages above are not required, the fee will be reduced. You may wish to handle the claim yourself and only have our advice in relation to some of the stages. This can also be arranged on your individual needs.

## **HOW LONG WILL MY MATTER TAKE?**

The time that it takes from taking your initial instructions to the final resolution of your matter depends largely on the stage at which your case is resolved. If a settlement is reached during pre-claim conciliation, your case is likely to take 1-3 months. If your claim proceeds to a Final Hearing, your case is likely to take 6-12 months, but this is subject to the availability of the Employment Tribunal and the pre-hearing directions. This is just an estimate and we will of course be able to give you a more accurate timescale once we have more information and as the matter progresses.

# CLAIM FOR WRONGFUL DISMISSAL

**Simple case:** £8,250-£10,450 (excluding VAT)

**Medium complexity case:** £10,450-£14,300 (excluding VAT)

**High complexity case:** upwards of £14,300 (excluding VAT) depending upon the circumstances of the matter.

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Factors that could make a case more complex:

- If it is necessary to make or defend applications to amend claims or to provide further information about an existing claim
- Defending claims that are brought by litigants in person
- Making or defending a costs application
- Allegations of discrimination which are linked to the dismissal
- Complex preliminary issues such as whether the claimant is disabled (if this is not agreed by the parties)
- If a preliminary hearing is required.
- Making an application for a provisional decision given during the course of a legal action (a preliminary application).
- The number of witnesses and documents
- If there are complex allegations about the Claimant's conduct.
- If it is an automatic unfair dismissal claim e.g. if you are dismissed after blowing the whistle on your employer
- If there is more than one potential Respondent e.g. in the case of a dismissal resulting from a transfer of the business or a part of it.

There will be an additional charge for attending a Tribunal Hearing of £1,000 per day (excluding VAT). Generally, we would allow 1-7 days depending on the complexity of your case.

Cost estimates may vary depending upon the needs of the client, any Employment Tribunal directions, and the conduct of any other party to the proceedings. We reserve the right to exceed these fee estimates where required.

## DISBURSEMENTS

Disbursements are costs related to your matter that are payable to third parties, such as court fees. We handle the payment of the disbursements on your behalf to ensure a smoother process.

Counsel's fees estimated between £750 to 3,500 per day (excluding VAT) (depending on experience of the advocate) for attending a Tribunal Hearing (including preparation). If a hearing lasts for more than one day, the fee for preparation and the first day is usually higher than the fee for subsequent days.

## **KEY STAGES**

The fees set out above cover all of the work in relation to the following key stages of a claim:

- Taking your initial instructions, reviewing the papers and advising you on merits and likely compensation (this is likely to be revisited throughout the matter and subject to change). You may have other options available to you for funding a Tribunal claim, e.g. cover under an insurance policy. We will discuss these options at our first meeting to check whether any apply to you.
- Entering into pre-claim conciliation where this is mandatory to explore whether a settlement can be reached;
- Preparing claim or response
- Reviewing and advising on claim or response from other party
- Exploring settlement and negotiating settlement throughout the process
- Preparing or considering a schedule of loss
- Preparing for (and attending) a Preliminary Hearing
- Exchanging documents with the other party and agreeing a bundle of documents
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- Agreeing a list of issues, a chronology and/or cast list
- Preparation and attendance at Final Hearing, including instructions to Counsel

The stages set out above are an indication and if some of stages above are not required, the fee will be reduced. You may wish to handle the claim yourself and only have our advice in relation to some of the stages. This can also be arranged on your individual needs.

## **HOW LONG WILL MY MATTER TAKE?**

The time that it takes from taking your initial instructions to the final resolution of your matter depends largely on the stage at which your case is resolved. If a settlement is reached during pre-claim conciliation, your case is likely to take 1-3 months. If your claim proceeds to a Final Hearing, your case is likely to take 6-18 months, but this is subject to the availability of the Employment Tribunal and the pre-hearing directions. This is just an estimate and we will of course be able to give you a more accurate timescale once we have more information and as the matter progresses.

# CONDITIONAL FEE AGREEMENTS & DAMAGES BASED AGREEMENTS

In some circumstances, we may consider entering into a Damages-Based Agreement with you. A Damages-Based Agreement is a type of Conditional Fee Arrangement. This is only applicable to those bringing the claim and not those defending a claim.

If we enter into this type of arrangement with you, our fees are determined as a percentage of the amount that you achieve if you win. A “win” would include any settlement reached or following any Employment Tribunal award. This percentage is usually 35% inclusive of VAT, although it is assessed on the circumstances of each matter.

If you were unsuccessful in your claim, you would not be required to pay our fees. There are exceptions to this which are set out below.

You will always be required to pay any disbursements incurred (whether you are successful or not) and these will usually be required on account prior to the costs being incurred.

The agreement is limited to pursuit of your claims. It does not cover:

- (a) any claims or counterclaims brought against you;
- (b) any appeal that either you or your employer may make including any appeal to the Employment Appeal Tribunal; or
- (c) any reference to the Court of Justice of the European Union.

## **DISBURSEMENTS**

Disbursements are costs related to your matter that are payable to third parties, such as Counsel's fees. We handle the payment of the disbursements on your behalf to ensure a smoother process.

Counsel's fees estimated between £750 to £3,500 per day (excluding VAT) (depending on experience of the advocate) for attending a Tribunal Hearing (including preparation). If a hearing lasts for more than one day, the fee for preparation and the first day is usually higher than the fee for subsequent days.

## **BREACH OF THE AGREEMENT**

If you breach the agreement, you would be required to pay our fees calculated on the basis of the relevant hourly rate. Breaching the agreement can include not acting in accordance with our advice, being untruthful in your representation of your claim to us or failing to provide in advance any payment required in respect of any disbursements which may be incurred. This is not exhaustive and we would provide further information prior to entering into this type of agreement. If you terminate the agreement prior to conclusion of the matter or become incapable of continuing with the matter, you would be required to pay our fees calculated on the basis of the relevant hourly rate.



## EMPLOYMENT LAW TEAM AND EXPERIENCE

Name	Position at BTMK	Qualifications	Relevant Experience
Fiona McAnaw	Director	Solicitor of the senior courts Admitted 2/9/2002	20 years of employment and litigation experience
Gabriella Shepherd	Solicitor	Solicitor Admitted 2/1/2020	4.5 years of litigation and debt recovery experience (Qualified as a solicitor January 2020)
Samantha Hyslop	Solicitor	Solicitor Admitted 1/9/2021	3.5 years of experience working in employment, civil litigation and debt recovery. (Qualified as a solicitor September 2021)

## CONVEYANCING WORK FEES

Our fees for a typical house purchase range from around £570 for a simple transaction to around £5,000 for exceptional circumstances, for example for a substantial historic building on unregistered land or a house with a very substantial purchase price, for instance exceeding £1m. That's why at BTMK, we will always provide you with an individual costs quotation at the start of a transaction, taking into account the actual features of your purchase. We will always advise you immediately about any variance, and discuss the potential impact on price before any additional charges are incurred.

Get an instant conveyancing quote [here](#).

In the sections set out below, we try to give as much information as possible to help you to decide about the solicitor you wish to engage with on your matter. For an accurate quote for your transaction, we'd invite you to use our online calculator, one which we have been using for many years to demonstrate our commitment to pricing transparency in relation to all of the conveyancing services that we offer throughout BTMK.

Type of transaction	Broad range of BTMK Fees (excluding VAT)	Broad range of Disbursements (excluding Stamp Duty and excluding VAT)	Potential Timescales
Freehold Purchase	£570 – £1075	£320.00 – £450.00	6-16 weeks
Freehold Sale	£570 – £1050	£105.17 – £200.00	6-16 weeks
Leasehold Purchase	£570 – £1125	£620.81 – £750.00	8-20 weeks
Leasehold Sale	£570 – £1100	£405.00 – £500.00	8-20 weeks
Re-mortgage f/h	£449 – £549	£101 – £150.00	3-5 weeks
Re-mortgage l/h	£449 – £549	£288 – £325	3-5 weeks

Get an instant conveyancing quote [here](#).

## A typical purchase of a freehold property

Our fees cover all of the work required to complete the purchase of your new home, including dealing with registration at the Land Registry and dealing with the payment of Stamp Duty Land Tax (Stamp Duty) if the property is in England, or Land Transaction Tax (Land Tax) if the property you wish to buy is in Wales.

### CONVEYANCER'S FEES AND DISBURSEMENTS:

Referral fee (if any)

- Our average referral fee paid for the referral of conveyancing work to BTMK is £152.00
- Recipients of a referral fee could be an estate or property agent or other individual or company that may refer your conveyancing work to BTMK including an Independent Financial Adviser, a Mortgage Broker or other such professional.

Get an instant conveyancing quote [here](#).

### STAMP DUTY OR LAND TAX (ON PURCHASE)

This depends on the purchase price of your property. You can calculate the amount you will need to pay by using HMRC's website or if the property is located in Wales by using the Welsh Revenue Authority's website [here](#).

Please note that this is based on many variable factors and the level of disbursements could quite possibly increase depending on your circumstances. It is therefore vital that you obtain a matter-specific quote from us before proceeding to ensure that you can afford your purchase.

Get an instant conveyancing quote [here](#).

### HOW LONG WILL MY HOUSE PURCHASE TAKE?

How long it will take from your offer being accepted until you can move in to your house will depend on a number of factors. The average process takes between 6-12 weeks.

It can be quicker or slower, depending on your personal or any exceptional circumstances.

Get an instant conveyancing quote [here](#).

### STAGES OF THE PROCESS

The precise stages involved in the purchase of a residential property vary according to the circumstances. However, below we have suggested some key stages that you may wish to include:

- Take your instructions and give you initial advice
- Check finances are in place to fund purchase and contact lender's solicitors if needed
- Receive and advise on contract documents
- Carry out searches
- Obtain further planning documentation if required
- Make any necessary enquiries of seller's solicitor
- Give you advice on all documents and information received
- Go through conditions of mortgage offer with you
- Send final contract to you for signature
- Agree completion date (date from which you own the property)
- Exchange contracts and notify you that this has happened
- Arrange for all monies needed to be received from lender and you
- Complete purchase
- Deal with payment of Stamp Duty/Land Tax
- Deal with application for registration at Land Registry

# PURCHASE OF A LEASEHOLD RESIDENTIAL PROPERTY

Our fees cover all the work\* required to complete the purchase of your new home, including dealing with registration at the Land Registry and dealing with the payment of Stamp Duty Land Tax (Stamp Duty) if the property is in England, or Land Transaction Tax (Land Tax) if the property is in Wales.

Get an instant conveyancing quote [here](#).

## DISBURSEMENTS

Disbursements are costs related to your matter that are payable to third parties, such as search fees. We handle the payment of the disbursements on your behalf to ensure a smoother process. There are certain disbursements which will be set out in the individual lease relating to the Property. The disbursements which we anticipate will apply are set out separately below. This list is not exhaustive and other disbursements may apply depending on the term of the lease. We will update you on the specific fees upon receipt and review of the lease from the seller's solicitors.

- HM Land Registry fee
- Search fees
- VAT on search fees
- Electronic money transfer fee
- VAT

Get an instant conveyancing quote [here](#).

## ANTICIPATED DISBURSEMENTS\*

- Notice of Transfer fee – This fee if chargeable is set out in the lease. Often the fee is between £125 and £175
- Notice of Charge fee (if the property is to be mortgaged) – This fee is set out in the lease. Often the fee is between £125 and £175
- Deed of Covenant fee – This fee is provided by the management company for the property and can be difficult to estimate.
- Certificate of Compliance fee – To be confirmed upon receipt of the lease.

*\*These fees vary from property to property and can on occasion be significantly more than the ranges given above. We can give you an accurate figure once we have sight of your specific documents.*

You should also be aware that ground rent and service charge are likely to apply throughout your ownership of the property. We will confirm the ground rent and the anticipated service charge as soon as this we receive this information.

Get an instant conveyancing quote [here](#).

## STAMP DUTY LAND TAX

This depends on the purchase price of your property. You can calculate the amount you will need to pay by using HMRC's website or if the property is located in Wales by using the Welsh Revenue Authority's website.

The precise stages involved in the purchase of a residential leasehold property vary according to the circumstances. However, below we have suggested some key stages that you may wish to include:

- Take your instructions and give you initial advice
- Check finances are in place to fund purchase and contact lender's solicitors if needed
- Receive and advise on contract documents
- Carry out searches
- Obtain further planning documentation if required
- Make any necessary enquiries of seller's solicitor
- Give you advice on all documents and information received
- Go through conditions of mortgage offer
- Send final contract to you for signature
- Draft Transfer
- Advise you on joint ownership
- Obtain pre-completion searches
- Agree completion date (date from which you own the property)
- Exchange contracts and notify you that this has happened
- Arrange for all monies needed to be received from lender and you
- Complete purchase
- Deal with payment of Stamp Duty/Land Tax
- Deal with application for registration at Land Registry

Get an instant conveyancing quote [here](#).

## CONVEYANCING TEAMS AND EXPERIENCE

<b>Name</b>	<b>Position at BTMK</b>	<b>Qualifications</b>	<b>Relevant Experience</b>
Matthew Clark	Director, shareholder	Solicitor of the senior courts Admitted 15/3/1996	22+ years of conveyancing experience
Chris Maddison	Director	Solicitor of the senior courts Admitted 1/8/2013	10+ years of conveyancing experience
Philip Freeman	Fee earner	Solicitor of the senior courts Admitted 15/6/2018	10+ years of conveyancing experience
Kevin Bourley	Fee earner	–	43+ years of conveyancing experience
Gill Neil	Fee earner	Licensed Conveyancer	20+ years of conveyancing experience
Jane Webb	Fee earner	FCILEX Fellow Legal Executive	44+ years of conveyancing experience
Emily Gowers	Legal Executive	Chartered Legal Executive	7+ years of conveyancing experience
Irfan Kunes	Solicitor	Solicitor Admitted 1/7/2010	10+ years of conveyancing experience
Kelly Blackman	Solicitor	Solicitor Admitted 4/5/2010	10+ years of conveyancing experience
Ian Powell	Director, Shareholder	Solicitor of the senior courts Admitted 1/9/1992	37+ years of conveyancing experience
Lee Emptage	Director	Solicitor of the senior courts Admitted 17/10/2005	15+ years of commercial conveyancing experience
Umut Tarhan	Solicitor	Solicitor of the senior courts Admitted 1/11/2012	10+ years of commercial conveyancing experience
Alan Simpson	Consultant Solicitor	Solicitor of the senior courts Admitted 16/11/1981	40+ years of conveyancing experience

# PRIVATE CLIENT

## FIXED FEE FOR APPLYING FOR THE GRANT OF REPRESENTATION

Our fixed fee for obtaining the Grant ranges from £1250+ VAT to £2750 + VAT depending upon the following –

- 1) The size of the estate
- 2) Whether or not there is any Inheritance Tax payable
- 3) Whether or not the Executors or Personal Representatives need to submit a full account to HM Revenue and Customs

In addition you will need to pay the following disbursements which are costs related to your matter that are payable to third parties, such as court fees.

### DISBURSEMENTS

Probate court fee £273 plus £1.50 per copy .

As part of our fixed fee we will:

- Identify the legally appointed executors or administrators
- Accurately identify the type of Probate application you will require
- Obtain the relevant documents required to make the application
- Complete the Probate Application and the relevant HMRC forms
- Draft a legal statement
- Make the application to the Probate Court on your behalf
- Obtain the Probate and requested number of copies

Typically, obtaining the grant of probate takes between 4 to 16 weeks, but can be considerably longer if Inheritance tax is payable.

### See the following examples of how the fixed fee operates:

**Example 1:** The value of Mr Smith's estate is £300,000 which consists of a flat worth £180,000 and various bank accounts totalling £120,000.

On the basis that this estate falls within his personal allowance, there is no Inheritance Tax payable and the Executors do not need to submit a full account to HMRC, our fixed fee in this example would therefore be £1250 + VAT plus the disbursements shown above.

**Example 2:** Mrs Bloggs is a widow having inherited her late husband's entire estate. The value of her estate is £850,000 which consists of a house worth £500,000 and £350,000 in cash and investments.

In this example, to ensure that no Inheritance tax is payable, a full account will need to be submitted to HMRC to claim all of the allowances available and our fee here would be £1750 + VAT plus disbursements.

**Example 3:** In any estate where there is Inheritance tax payable, our fixed fee for obtaining the Grant will be £2750 + VAT plus disbursements.

# PROBATE AND ADMINISTRATION OF ESTATES

We offer two services; one where we just obtain the Grant of Probate (“Grant only”) which is usually on a fixed fee basis, and a full administration where we conduct the entire administration. This latter service is hourly rate based and not on a fixed fee.

## FULL ADMINISTRATION

This service will involve us applying for the grant, collecting and distributing the assets. We will handle the full process for you. This guide is for estates where:

- There is a valid will
- There is no more than one property
- There are no more than 4 bank or building society accounts
- There are no other intangible assets
- There are no more than 4 legatees (people or institutions that receive a cash sum)
- There are between 1 and 4 residuary beneficiaries (people who share what is left after all legacies, costs and debts have been discharged)
- There are no disputes between beneficiaries on the division of assets. If disputes arise this is likely to lead to an increase in costs
- There is no inheritance tax payable and the executors do not need to submit a full account to HMRC
- There are no claims made against the estate

Likely disbursements in addition to our fees:

- Probate application fee of £279 (including 4 copies of the Grant)
- £3 HM Land Registry office copy entry fee in relation to the property
- Between £200 and £300 – Advertise the death in The London Gazette and a local newspaper – this protects against unexpected claims from unknown creditors.

These disbursements are not normally subject to VAT.

Our fees are split into two parts; time costs and the value element.

## TIME COSTS

We anticipate an estate like this will take between 10 and 25 hours work at £225 per hour. The total time costs are therefore estimated to be between £2250 and £5625 (plus VAT).

The exact cost will depend on the individual circumstances of the matter. For example, if there is one beneficiary and no property, time costs will be at the lower end of the range. If there are multiple beneficiaries, 4 legatees, a property and multiple bank accounts, time costs will be at the higher end.

## POTENTIAL ADDITIONAL COSTS

- If there is no will or the estate consists of any share holdings (stocks and bonds) there is likely to be additional costs that could range significantly depending on the estate and how it is to be dealt with. We can give you a more accurate quote once we have more information.
- If any additional copies of the grant are required, they will cost £1.50 each (1 per asset usually).
- Dealing with the sale or transfer of any property in the estate is not included.
- Any income tax returns that need to be prepared are not included.
- If the estate is larger than first thought, there are foreign assets or if any lifetime gifts in the seven years prior to death have been made, then this will mean a full Inheritance Tax account will need to be prepared for HM Revenue & Customs and the costs could increase significantly.

Disbursements are costs related to your matter that are payable to third parties, such as court fees. We handle the payment of the disbursements on your behalf to ensure a smoother process.

## VALUE ELEMENT

Where we are instructed by the Personal Representatives, the value element is a small percentage of the value of the estate as declared for Probate purposes and is 0.5% of any real estate and 1% of everything else (plus VAT). Please note that where BTMK are appointed as Personal Representatives in the Will, the value element is 0.75% of any real estate and 1.5% of everything else (plus VAT).

Therefore, if an estate has a house worth £250,000 and there is £50,000 of other liquid assets, then the value element will be –

Real estate – £250,000 x ½% = £1250

Other assets £50,000 x 1% = £500.

Total value element costs £1750 plus VAT.

The full costs involve adding the time fees, value element and disbursements together.

We also offer an option of no value element, but this is based on a higher hourly rate.

## HOW LONG WILL THIS TAKE?

On average, estates that fall within this range are dealt with within 6-9 months. Typically, obtaining the grant of probate takes 10-16 weeks. Collecting assets then follows, which can take between 3-10 weeks. Once this has been done, we can distribute the assets, which normally takes 2-3 weeks, although we do recommend that Personal Representatives adhere to the statutory period of waiting 6 months after the date of the Grant of Probate to make sure that there are no claims against the estate.

## PRIVATE CLIENT TEAMS AND EXPERIENCE

Name	Position at BTMK	Qualifications	Relevant Experience
Saul Caplan	Director, shareholder solicitor	Solicitor of the senior courts Admitted 1/10/1993	5+ years of non-contentious private client experience 25+ years of litigation experience in private client work
Mark Goodson	–	STEP qualified	32+ years of private client experience
Paula Dallison	Senior private client practitioner	–	9+ years of private client experience
Megan McKinlay	Senior caseworker	–	10+ years of private client experience
Susan Foxen	Caseworker	–	10+ years of private client experience
Kavita Ryatt	Solicitor	Solicitor of the senior courts Admitted 16/3/2020	4+ years of private client experience
Sophie Bacon	Solicitor	Solicitor of the senior courts Admitted 16/3/2020	4+ years of private client experience



# COMPLAINTS GUIDANCE

We want to give you the best possible service. However, if at any point you become unhappy or concerned about the service we have provided then you should inform us immediately, so that we can do our best to resolve the problem.

In the first instance it may be helpful to contact the person who is working on your case to discuss your concerns and we will do our best to resolve any issues at this stage. If you would like to make a formal complaint, then you can read our full complaints procedure [here](#).

Making a complaint will not affect how we handle your case.

The Solicitors Regulation Authority can help you if you are concerned about our behaviour. This could be for things like alleged dishonesty, taking or losing your money or treating you unfairly because of your age, a disability or other characteristic.

You can raise your concerns with the Solicitors Regulation Authority.

[sra.org.uk/consumers/problems/report-solicitor](http://sra.org.uk/consumers/problems/report-solicitor)

## WHAT DO TO IF WE CANNOT RESOLVE YOUR COMPLAINT

The Legal Ombudsman can help you if we are unable to resolve your complaint ourselves. They will look at your complaint independently and it will not affect how we handle your case.

Before accepting a complaint for investigation, the Legal Ombudsman will check that you have tried to resolve your complaint with us first. If you have, then you must take your complaint to the Legal Ombudsman:

- Within six months of receiving a final response to your complaint
- and*
- No more than one year from the date of act/omission; or
  - No more than one year from when you should reasonably have known there was cause for complaint.

If you would like more information about the Legal Ombudsman, please contact them.

## Contact details

**Visit:** <http://www.legalombudsman.org.uk/>

**Call:** 0300 555 0333 between 9am to 5pm

**Email:** [enquiries@legalombudsman.org.uk](mailto:enquiries@legalombudsman.org.uk)

**Address:** Legal Ombudsman PO Box 6806, Wolverhampton, WV1 9WJ



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**BTMK**  
MARCUS BAUM

**BTMK**  
TODMANS

**BTMK**  
ALAN SIMPSON



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