



Probate Valuation Service

When an individual passes away it is usually a requirement to value their Estate – the assets they held as at the date of death. If the deceased was holding stocks and shares, HMRC sets guidance as to how these investments should be valued. To enable probate to be completed quickly and in accordance with HMRC requirements, you can choose to use our Probate Valuation Service and we will respond by email or letter. Please do not hesitate to contact us for further information.

CHARGES

VALUATION ONLY BRONZE	HOLDING CONFIRMATION AND VALUATION SILVER	ESTATE RESEARCH, HOLDING CONFIRMATION AND VALUATION GOLD
UK Security: £7.50 +VAT Overseas Security: £10 +VAT Minimum: £35 +VAT Charge only applies where price provided.	UK Security: £12.50 +VAT Overseas Security - excluding US holdings: £15 +VAT Minimum: £50 +VAT Charge applies regardless of the outcome.	UK Security: £20 +VAT Overseas Security - excluding US holdings: £22.50 +VAT Minimum: £75 +VAT Charge applies regardless of the outcome.
We will aim to provide a valuation within three working days.	We will aim to contact the registrars within three working days. Please note, we are unable to confirm US holdings for Silver and Gold Service. If a security within the portfolio is held with a US registrar, that security will be treated as Bronze, while the rest of the portfolio will be valued per the requested level. The final Probate Valuation delivery depends on the registrar's response times.	
For certificated holdings, the Death Certificate can be registered with the Registrar for £25 +VAT per registrar.		

REGISTERING PROBATE

For certificated holdings, probate must be registered with the relevant registrar for each holding before any disposals or transfers can be made. We charge £25 +VAT per registrar to do this or we can provide you with the necessary contact details to register this yourself.

SALE AND TRANSFER OF ASSETS

Should the sale of holdings be necessary at a later date, once probate has been granted, Redmayne Bentley would be happy to undertake the transactions. Alternatively, we can arrange for the stock to go into a Nominee portfolio or be transferred to another individual or a trust, in line with the executors' instructions. Please contact your usual Redmayne Bentley office to request this; the Probate team will be able to provide contact details if necessary.

Please complete all details in **CAPITALS**.

Name of Deceased _____ Date of Death ____/____/____

If you require the Silver or Gold service for any holdings, please provide the Deceased's address (and any previously known addresses):

 _____ Postcode _____

CONTACT DETAILS (OF INDIVIDUAL REQUESTING VALUATION)

Title _____ Surname _____ Tel _____

First Name(s) (In full) _____ Email _____

Company/Capacity (e.g. executors) _____
 _____ Probate Valuations will be sent by email to the above email
 address where provided. If you would prefer to receive the
 Probate Valuation in the post, please tick here

Redmayne Bentley Agent Code (if applicable) _____

Address _____

 _____ Postcode _____

PRIVACY POLICY

Our *Privacy Policy* contains information on how we will store and use your personal information and your rights in relation to this. You can view the full policy online at www.redmayne.co.uk/privacy or in hard copy on request.

HOLDINGS

If the deceased held shares with Redmayne Bentley, please specify the Portfolio ID(s) _____

If the holdings are not in an existing Redmayne Bentley portfolio, please list the investments held below and indicate which service level is required for each holding.

NAME OF STOCK	DESCRIPTION	QUANTITY	SERVICE LEVEL REQUIRED
<i>Example - Marks & Spencer Group Plc</i>	<i>Ordinary 25p</i>	<i>1,000</i>	<i>Silver</i>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

Please photocopy this form should you require additional lines for further holdings.

Please return this form and a copy of the death certificate to: Portfolio Administration and Reporting, Redmayne Bentley, Mortimer House, 40 Chatsworth Parade, Petts Wood, BR5 1DE or email probate@redmayne.co.uk

For more details, please contact your usual Redmayne Bentley office/executive or Portfolio Administration and Reporting on 01689 882 129 or email probate@redmayne.co.uk

DECLARATION

- By signing and returning this form, I authorise Redmayne Bentley to proceed with the valuation of each of the holdings listed, and understand that I will then incur costs in line with the charges specified above. If acting in a professional capacity, this includes ensuring that the executors are made aware of the charges.
- I confirm I am authorised to receive such information.
- I enclose/attach a copy of the death certificate.
- I can confirm that the invoice will be settled within 28 days of being issued.

PLEASE SIGN HERE



_____ /_____/_____

SIGNATURE

DATE