



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 if preferred) according to your preference. Please do not hesitate to contact us for further information when appropriate.

CHARGES

The charge for this service is £7.50 per line of stock plus VAT, subject to a minimum of £35 plus VAT.

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 per holding plus VAT 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 account or be transferred to another individual or a trust, in line with the executors' instructions.

Please complete all details in **CAPITALS**.

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

CONTACT DETAILS (OF INDIVIDUAL REQUESTING VALUATION)

Title _____ Surname _____ Tel (Day) _____

First Names (In full) _____ Tel (Mobile) _____

Company/Capacity (e.g. executors) _____ Email _____

Redmayne Bentley Agent No (if applicable) _____ 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

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 ask us for a hard copy.

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.

PLEASE SIGN HERE

 _____ / ____/____

SIGNATURE

DATE

HOLDINGS

If the deceased held shares with Redmayne Bentley, please specify the account number(s) _____

If there is not an existing Redmayne Bentley account, please list the investments held below and indicate if these holdings have been confirmed with the company registrars. If you are uncertain whether the holdings are confirmed, please let us know if you want the holdings to be confirmed on your behalf. Please note, if we are required to confirm the holdings this will delay the time it takes to produce the Probate Valuation.

We will not confirm holdings with the company registrar unless explicitly requested regardless of whether you have already confirmed the holdings or not.

NAME OF STOCK	DESCRIPTION	QUANTITY	CONFIRMED
<i>Example - Marks & Spencer Group Plc</i>	<i>Ordinary 25p</i>	<i>1,000</i>	<i>✓</i>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			
16.			
17.			
18.			
19.			
20.			
21.			
22.			
23.			
24.			
25.			

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

Please return this form and a copy of the death certificate to: Investment Operations, Redmayne Bentley, 346 Crofton Road, Locksbottom, Orpington BR6 8NN or email investmentoperations@redmayne.co.uk

For more details, please contact your usual Redmayne Bentley office/executive or Investment Operations on 01689 882 129 or email investmentoperations@redmayne.co.uk