



*I don't know  
where to start  
with the  
paperwork*

THE  
**FAMILY**  
BUILDING  
SOCIETY

A GUIDE TO  
**ESTATE ADMINISTRATION**

In conjunction with

 **Kings Court Trust**  
The estate administration people

*“We didn’t have to worry about a single thing”*

At this difficult time, we would like to offer our support by providing access to experts who can help you through the estate administration process. Dealing with paperwork and asset distribution may well be the last thing you feel like doing at a time of great distress.

This is why we work in partnership with specialists **Kings Court Trust**, our chosen provider of estate administration services. They have many years’ experience in settling the sometimes complex process of dealing with the affairs of a relative or next of kin in a sympathetic, knowledgeable and efficient way. From closing bank accounts, to selling a house, to setting up a trust, they will take full legal responsibility for administering an estate, from beginning to end.



Of course, you can administer the estate yourself. However, complicated issues may come to light that will require many hours of your time to resolve, as well as involve several different organisations and authorities. Such issues may include:

- **A Will that isn’t valid or can’t be found**
- **Collating information on, and valuing, all assets and liabilities**
- **Dealing with the legal and tax paperwork associated with an estate**
- **Managing the sale of a property**
- **Dealing with foreign assets such as a holiday home or shares traded on overseas stock exchanges**
- **Tracing beneficiaries who might have gone missing**

We have the confidence in Kings Court Trust to deal with all the issues you may come across in administering an estate. What’s more, you’ll never have to deal with more than one organisation to complete the administration of your loved one’s estate.

As part of their service, you have access to the Kings Court Trust free Advice Line and they will also be happy to arrange a no-obligation home visit from one of their experienced consultants, at a time to suit you.

# WHAT DOES THE ESTATE ADMINISTRATION SERVICE INVOLVE?

ALTHOUGH IT IS DIFFICULT TO SAY JUST WHAT A TYPICAL ESTATE LOOKS LIKE, THE FOLLOWING SCENARIO BEST ILLUSTRATES SOME OF THE SERVICES AVAILABLE FROM KINGS COURT TRUST.

## CASE STUDY

Steven Phillips' estate included the family home in Liverpool valued at £120,000, £20,000 in bank accounts and £5,000 in British Telecom shares – a total estate of £145,000 and below the threshold level for Inheritance Tax in the UK.

The house, shares and bank accounts were in Steven's name, so even though his Will left everything to his one son, Adrian, a Grant of Probate was required.

### The Kings Court Trust service

Steven's son appointed Kings Court Trust to handle the estate administration because he lived 200 miles from his father. He worked full-time and was concerned at the amount of time the process would take should he do it himself.

A Kings Court Trust consultant met with Adrian at his home in London, provided him with a fixed-fee quote for the service and informed him that his dedicated case manager would be able to deal with all the assets on his behalf, swiftly and efficiently.

Kings Court Trust firstly insured the empty property using their own specialist insurance policy; they then engaged their local estate agent to ensure that the property was secure and arranged

a valuation. Kings Court Trust's in-house legal team obtained the Grant of Probate which allowed the property to be sold and also enabled them to transfer the value of Steven's savings into their client account.

Adrian wanted to keep the shares, as he was confident they would increase in value; therefore, these were transferred into his name. As each of these tasks was completed, Kings Court Trust updated Adrian on the progress being made so that he always knew what was being done on his behalf.

The family home sold relatively quickly and Adrian received a cheque for his inheritance less than three months after his father passed away.

## SOME COMMONLY ASKED QUESTIONS

**Q. How does Kings Court Trust get paid for providing this service?**

**A.** Kings Court Trust offers their full range of estate administration services on a fixed price basis. At the start of the case, they will quote you a fixed fee for every element of the estate administration process, including all third party costs and VAT. Their fixed price will be based on the tasks required to administer the estate and not on the time taken, or the value of the estate. There are no minimum fees or hourly rates. Fees are taken from the estate, provided there are adequate liquid assets available.

**Q. Do I have to pay in advance?**

**A.** No – you don't need to worry about covering the cost of the service up-front.

**Q. How long will the service take to complete?**

**A.** This will depend on the complexity of the estate, but Kings Court Trust's average case duration is nine months from appointment to final distribution, making them one of the quickest services on the market.

## CUSTOMER COMMENTS

*"My auntie died very suddenly and unexpectedly in Cheshire. We were put in contact with Kings Court Trust and from that day on, we didn't have to worry about a single thing. Absolutely everything from obtaining probate to selling my aunt's property and repaying the equity release loan was dealt with by Kings Court Trust and their associates. Our case manager was always on hand, whether by telephone or email, and all queries were dealt with almost immediately. Things went smoothly with their help and it was an enormous relief to know that they were dealing with everything. I would have no hesitation in recommending Kings Court Trust to anyone. I cannot speak too highly of their services."*

**Mr W**

*"Kings Court Trust took away the stress of dealing with the aftermath of my mother's death in a considerate way. They were extremely professional and kept me informed at every stage of proceedings. I would happily recommend them."*

**Mrs G**

*"The staff were helpful and polite at all times, answering all queries promptly and making forms as simple as possible to complete at a very stressful time. I would definitely use them again and recommend them to anyone."*

**Mrs T**

*"I found Kings Court Trust to be excellent from start to finish. They always answered any queries I had, were always professional and if I left a message at any time it was dealt with or replied to."*

**Mrs C**

*"Rita Clark was very professional at all times and always replied promptly to any questions we had. I couldn't fault her at all! We were kept informed and things were explained fully. I would highly recommend Kings Court Trust to anyone."*

**Miss S**

*"Great service, always kept informed. The online chart was brilliant so that we could follow the case's progress at any time. Would use again and recommend to others."*

**Ms P**

*"I was not at all familiar with the processes required and was glad that a company like Kings Court Trust could be used to move the process forward at a fair price and without additional stress during a very difficult time. I would recommend using them in future."*

**Mr M**

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## WE'RE HERE TO HELP

To discuss your estate administration requirements or for more information, please call us on **03300 244595**.

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**EBBISHAM HOUSE  
30 CHURCH STREET  
EPSOM, SURREY  
KT17 4NL**

[www.familybuildingsociety.co.uk](http://www.familybuildingsociety.co.uk)