



WILLS, PROBATE & ESTATE ADMINISTRATION



Helping you thrive in a changing world

WILLS, PROBATE & ESTATE ADMINISTRATION

Ensuring the people you care for are provided for in the future is important to all of us and our Wills, Probate and Estate Administration services give you the confidence that this has been achieved.

Our complete and succinct service covers everything from advising on Inheritance Tax planning, to writing your Will, through to administering your Estate.

Wills

A Will is likely to be the most important document you make in your lifetime. Our experts will ensure your family and loved ones are supported and provided for after you are gone.

As well as drawing up a concise, legal document, we advise how best to ensure your loved ones, especially children, inherit your Estate in both a timely and tax-efficient manner through use of Inheritance Tax planning.

If you do not make a Will, under the Intestacy Rules your estate could pass to people you never intended to benefit. Unfortunately, many 'DIY' Wills fail after death due to an error in the drafting or the Will not being witnessed correctly. This means the Will becomes ineffective and you risk your estate passing under the Intestacy Rules.

Even if you already have a Will it is important to carry out regular reviews, especially if there has been a change in your personal or financial circumstances.

Lasting Power of Attorney

Making a Lasting Power of Attorney allows you to decide who you would want to act on your behalf should you no longer be able to manage your own financial affairs or make decisions on your health or welfare. We advise and draft on both property and financial affairs, and health and welfare Lasting Powers of Attorney.

Alternatively, you may be concerned a loved one has already lost capacity without appointing anyone to act on their behalf. We can offer advice and support on making the application to the Court of Protection for a Deputyship order.

A Deputy acts in a similar way to an Attorney by acting in the best interests of the incapacitated person and making decisions on their behalf.



Probate & Estate Administration

We provide expert support and guidance to you and your loved ones throughout every step of the probate process. Our specialist tax knowledge and legal expertise enable us to handle the probate process in a compassionate, sensitive and efficient manner. Our team is on hand to help you every step of the way, including:

- Locating the Will;
- If there is no Will, assist in determining the beneficiaries under the Intestacy Rules;
- Establishing the value of assets in the Estate;
- Completing relevant Inheritance Tax forms and preparing the Statement of Truth;
- Making the application to the Probate Registry for the Grant of Representation;
- Collecting all assets, paying liabilities and preparing Estate Accounts;
- Distributing the Estate to the correct beneficiaries

TRUSTED ADVICE THROUGH
GENERATIONS

About Moore

We help you thrive in a changing world.

We provide all the support and guidance you need to deal with new risks and opportunities. We ensure easy access to the right people, so decisions can be made quickly and confidently. A consistent team will partner with you to support your aspirations and contribute to your success.

You'll have access to a range of core services, including audit, accounting, tax, risk and systems assurance, corporate finance, restructuring and insolvency, wealth management and disputes analysis. As a Top 20 accounting and advisory network we support a broad range of individuals and entrepreneurs, large organisations and complex international businesses.

If your business and personal interactions need to expand, we'll help make it happen – coordinating advice from a network of offices throughout the UK and in more than 100 countries.

Moore Network

Each Moore firm in the UK is a member of Moore Global Network Limited, a global accountancy and advisory network headquartered in London. Moore Global Network Limited and its member firms are legally distinct and separate entities.

By combining local expertise and experience with the breadth of our UK and worldwide networks, clients can be confident that, whatever their requirement, Moore provides the right solution to their local, national and international needs.

Contact information

If you would like further information on any item within this brochure, or information on our services please contact:

Tracey Ledgister Forbes – Private Client Solicitor



Tracey is a solicitor with more than 20 years' experience and is a member of The Society of Trusts and Estates Practitioners (STEP), an organisation of legal professionals who specialise in providing advice to older and vulnerable people and their families and carers.

Tracey has a wealth of experience in Will drafting, probate, Lasting Powers of Attorney, and the Administration of Estates as well as being a Court appointed deputy for incapacitated clients.

Tracey offers a friendly, sympathetic approach and works hard to ensure complex areas of law are explained in plain and straightforward language. She enjoys meeting clients and helping to make a difficult time as stress free as possible.

She is happy to see clients at either the Enfield or Stevenage office or to visit them at their home in the surrounding areas. She is also able to provide appointments virtually by Teams or Zoom if preferred.

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