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# Case Studies

What we've achieved  
for our clients

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National  
Bereavement  
Service

# Case Study 1:

## Exceptional Probate Services for the Leitch Family



### Background

The Leitch family recently faced the death of their beloved matriarch, Mrs. Aletha Leitch. As the executor of her estate, her eldest son Mr. Timothy Leitch was responsible for handling probate and the administration of the estate. Feeling overwhelmed by the legal complexities, as well as living outside of the UK, Timothy sought professional assistance to ensure everything was handled correctly, and in the best interests of Mrs Leitch's beneficiaries.

### Challenge

Timothy was unfamiliar with the probate process and worried about navigating the legal requirements and paperwork. He needed a reliable and compassionate solicitor to assist him with applying for the Grant of Probate and managing the full administration of his mother's estate.

### Solution

Timothy contacted the National Bereavement Service's probate team following a recommendation from a funeral director. From the initial

consultation, our team provided clear, empathetic guidance and outlined the steps involved in the probate process.

### Services delivered included:

#### 1. Application for Grant of Probate:

Our solicitor handled the entire application process for the Grant of Probate. This included preparing the necessary documentation, submitting the application to the Probate Registry, and paying the court fee. The fee for this service is £599 plus VAT (£718.80), along with the court fee of £300. However, if full estate administration is also delivered, this £718.80 fee is deducted.

#### 2. Full Estate Administration:

Upon receiving the Grant of Probate, our panel solicitor took on the full administration of Mrs. Leitch's estate. This comprehensive service included valuing the estate, settling any debts and taxes, distributing assets to the beneficiaries, and ensuring all legal obligations were met. The cost for this service was £3750 plus VAT (£4500), plus the court fee of £300 (including the legal costs for Grant of Probate).

### Outcome

Throughout the process, Timothy received regular updates and felt fully supported by our team. Our efficient handling of the probate application and estate administration allowed him to focus on grieving and supporting his family without the added stress of managing complex legal matters.

Timothy expressed his gratitude for our thorough and compassionate service. He appreciated the transparent communication and the way we made a challenging time more manageable.

### Conclusion

The Leitch family's experience highlights the importance of professional probate and estate administration support. Our team is committed to delivering exceptional service, helping clients to navigate this difficult time with confidence and peace of mind.



From the moment I contacted the National Bereavement Service, I felt a weight lifted off my shoulders. Their professionalism and empathy were evident from the start. The team guided me through every step of the probate process with clarity and patience. Thanks to their excellent service, I was able to fulfil my duties as executor without feeling overwhelmed. I highly recommend their probate services to anyone in need.

**Timothy Leitch**



# Case Study 2:

## Free Guidance and Support for the Pattison Family

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### Background

The Pattison family not only had to deal with the death of a close family member, but with the Probate Registry's interpretation of the Forfeiture Rules. After submitting a probate application for Grant of Representation, the Registry could not determine who was considered to have died first for the purposes of estate administration.

### Forfeiture Rules

The Forfeiture Rule is a legal principle that prevents a person from benefiting from their wrongdoing, typically in cases of unlawful killing. If a person unlawfully kills another, they are usually barred from inheriting from the deceased's estate. The specific rules and applications can vary, so it's important to consult legal advice specific to the jurisdiction.

When two individuals die simultaneously or in circumstances where it is unclear who died first, the order of death can significantly impact the distribution of their estates.

### Summary

1. Under the Forfeiture Act the perpetrator within the Pattison family cannot inherit from the victim and is deemed to have died first.
2. In this particular case, under the 28 Day Spouse survivorship rule the victim cannot inherit from Perpetrator
3. The child in the Pattison family dies is a minor so cannot inherit from either parents
4. Therefore the Perpetrator's Estate passes to his next of kin and the victim's estate passes to her next of kin.

### Challenge

The father of the deceased individual had to write a formal letter to the Probate Registry for clarity on how to deal with the estate and to ensure the estate was distributed among other beneficiaries following Notice of Conviction and under the Forfeiture Rules.

### Solution

Following free advice from a trusted solicitor that the NBS frequently works with, the father of the deceased individual wrote to the Probate Registry, which has now accepted the family's argument as to who the entitled beneficiaries are under the Forfeiture Rules.

### Services Provided

Free advice to progress a complex probate application, subject to Forfeiture Rules, to a successful outcome.

### Outcome

From initial contact, advice was provided to assist with ensuring the Probate Registry received the full facts of the case in order that the probate application would be granted.

### Conclusion

Free, prompt guidance was provided and representations made to the Probate Registry so that Grant of Representation was successfully given.

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Thank you for your support and please thank the National Bereavement Service for putting us in touch.

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# Case Study 3:

## Support for the Hughes Family

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### Background

The Hughes family needed a Grant of Probate so that bank accounts of a deceased family member could be formally closed and funds released.

### Challenge

Following the death of the family's mother, family members administering her estate were very unfamiliar with the probate process and daunted by complex legal forms.

### Solution

The National Bereavement Service referred the family to a solicitor that we regularly work with, who delivered free initial advice. The client agreed that further legal support was needed, and they engaged the expertise of a specialist solicitor.

### Services Provided

Free advice to progress a probate application, followed by a referral to an expert solicitor who submitted the application for a Grant of Probate.

### Outcome

From initial contact, free advice was provided in relation to the legal procedure that the family could expect. Further support from a specialist, competitively-priced solicitor was sought in order to submit the application.

### Conclusion

Free initial guidance was provided, and the application for Grant of Probate submitted and received promptly.

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The whole process was straight forward and very easy to understand, I was on a very wobbly frame of mind when I contacted you and uncertain of the procedure, but my fears were soon allayed. My case was resolved within a month which I don't think could be improved upon, very impressed. Excellent service at a very emotional time

**Elaine Hughes**

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# Case Study 4:

## Competitively Priced Fees

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### Background

Debbie first reached out to the NBS seeking practical assistance and support regarding probate. Her mother had recently passed away, her father having died many years prior, leaving an estate valued at approximately £1 million. After obtaining probate and estate administration quotes from solicitors and national providers exceeding £19,000, Debbie was contemplating handling the estate herself, as she had already gathered much of the information needed in relation to its value.

### Challenge

The probate process can be legally complex, requiring a thorough understanding of relevant laws and regulations, especially as Debbie's father had died over 20 years ago and the inheritance tax thresholds were staggered. Ensuring all necessary documents are completed and

submitted on time, as well as managing a bereavement and day-to-day life, can be daunting for someone without legal expertise. Errors in handling probate can lead to financial penalties or additional costs, and so finding a reputable legal firm, as well as a competitively-priced service, was another of the challenges that Debbie was faced with.

### Solution

Debbie contacted the NBS and received guidance on the pros and cons of handling probate herself, as well as information and support in respect of engaging a legal professional. Following a free consultation with a solicitor, she was advised that the solicitor would handle the complex probate application documentation and ensure that the correct allowances were applied regarding inheritance tax.

### Services delivered included:

**Free consultation on guidance on applying for Grant of Probate:** Our solicitor provided free support together with a transparent price for handling the application form.

**Completion of probate documentation, including IHT 400 series of forms:** A fixed fee was provided of £2100, resulting in a saving for Debbie of £16,000.

### Outcome

Following a free consultation and transparent fixed fees provided, Debbie proceeded to instruct the solicitor.

“

I'm so pleased I contacted the National Bereavement Service, it's been a difficult few months and you've really helped take the pressure off ensuring the forms are submitted correctly.

Anon

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**You Are Not Alone.**

The National Bereavement Service is here to support you with information and guidance or simply a listening ear.

**Phone:** 0800 024 6121

**NBS Chat:** [www.theNBS.org](http://www.theNBS.org)

**Email:** [info@theNBS.org](mailto:info@theNBS.org)

**Monday – Friday** 9.00am – 6.00pm

**Saturday** 10.00am – 2.00pm

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