



Fees and Charges

...welcome to transparent pricing

SWW Trust



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SWW Trust Corporation is a business name operated by Probate & Trustee Services Ltd
Registered Office: Eagle House Exchange Road Lincoln LN6 3JZ
Registered in England & Wales No. 05249829

No fees are payable until the Company commences its duties

Fees for acting as Executor or Administrator

A maximum fee of 1.25% of the gross value of the estate plus disbursements and Value Added Tax*

A full fee prediction is made at the outset based on the assets within the estate and the amount of work required to carry out the administration.

A minimum fee of £1000.00 (plus disbursements and VAT) is chargeable in all cases where the company acts as executor or administrator.

(*Should there be any contentious or hostile issues arising throughout the administration SWW Trust Corporation reserve the right to charge for any additional work at their standard hourly rate, currently £120 + VAT per hour)

Fees for acting on a 'Hand Hold' basis for the appointed executor(s) or administrator(s)

Fees are chargeable on the basis of the time expended at an hourly rate (currently £120.00 + VAT per hour) or on the basis of an agreed overall inclusive total fee. This fee does not include any disbursements and these will be added to the final amount payable.

A minimum fee of £250.00 plus VAT is payable.

Fees for acting as Trustee

Fees are calculated on the capital value of the trust property and are chargeable as follows:

(a) A set up charge will be levied on creation of the trust. A quote will be provided before any work is undertaken. This charge is reduced where the trust has been established under a will and the Company acted as personal representative.

(b) An annual management fee will be calculated at 1%, subject to a minimum of £500 per annum, on the market value (actual or estimated) of the assets held at the commencement of each year.

(c) A maximum fee at the rate of 2% will be payable out of capital on the gross amount or market value (actual or estimated) of any capital funds or assets paid out or released from the estate or trust. This may be lower dependant upon the nature of the assets.

‘Dormant’ Trusts, e.g. property trusts with a life interest, will not be subject to the above charges after the initial creation. Fees will be charged on a ‘time spent’ basis at our current hourly rate (£120 +VAT) at the commencement of the company’s duties.

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SWW *Trust Corporation*

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