

DAVY

# A GUIDE TO DAVY PROBATE

[www.davy.ie/probate](http://www.davy.ie/probate)



Davy is one of the largest providers of probate services to solicitors, executors and administrators in Ireland. Our team deals directly with company registrars on your client's behalf taking the uncertainty out of securities and estate administration. We can update valuations for Capital Acquisitions Tax and Capital Gains Tax purposes. We also carry out the administration of the securities post grant dealing with shares worldwide.

### **Advisory services**

We can offer advice in the following areas:

- Probate valuations
- Whether an estate's portfolio should be sold or transferred

### **Our range of services**

- Probate valuations
  - Researched in full with holdings confirmed with relevant registrars
  - Information on relevant corporate actions
  - Current value assessment of historic holdings
- Notation of death with registrar on Irish, UK and US holdings
- Transfer of certificated Irish, UK and US stock to beneficiaries
- Collection of outstanding dividends
- Replacement of mislaid share certificates
- Small estates procedure
- Administration of shares in will trusts
- Issue of sterling drafts

For more information on our Share Dealing services, please visit [www.davy.ie/sharedealing](http://www.davy.ie/sharedealing)

## SERVICE CHARGES

<b>Probate valuations</b>	<b>0.4%</b> of the valuation <b>+VAT</b> Minimum fee is <b>€100 +VAT</b>
<b>Professional fees</b>	<b>€100 +VAT</b> per hour
<b>Noting of death and transfer of certificated shareholding</b>	<b>€240 +VAT</b> per line of stock

**Note:** VAT will be charged at the rate in force when the fee falls due

## WHAT WE REQUIRE FROM YOU...

### Probate Valuations

- Letter of request for a probate valuation with the following information:
  - Full name and address of deceased and any variations thereof
  - List of all securities to be valued, with copies of the documents where possible
- Letter of Authority from the Executors if appointing a solicitor to assist with the Estate
- Copy of the Will
- Copy of death certificate

Please do not send original documents for valuations. Send copies of certificates and other documents only.

### Estate Administration

- Estate Account Application Form signed by the executors
- Solicitor's certified copy of Grant of Probate
- Valid share certificates
- Signed CREST transfer forms – one per shareholding
- Letter of Authority from the Executors if appointing a solicitor to assist with the Estate
- Copy of the Will

## CONTACT US

<b>Shona MacNeill</b>	Probate Manager	
<b>Elizabeth Murray</b>	Probate Professional	<b>T</b> 01 614 8793
<b>Áine Allen</b>	Probate Professional	<b>T</b> 01 614 9937
<b>Valerie Ryan</b>	Probate Professional	<b>T</b> 01 614 9949
<b>Nicola Bates</b>	Probate Professional	<b>T</b> 01 614 9147

[www.davy.ie/probate](http://www.davy.ie/probate)

[probate@davy.ie](mailto:probate@davy.ie)

### Dublin Office

Davy House  
49 Dawson Street  
Dublin 2  
Ireland  
T +353 1 679 7788  
[dublin@davy.ie](mailto:dublin@davy.ie)

### Galway Office

1 Dockgate  
Dock Road  
Galway  
Ireland  
T +353 91 530 520  
[galway@davy.ie](mailto:galway@davy.ie)

### Belfast Office

Donegall House  
7 Donegall Square North  
Belfast BT1 5GB  
Northern Ireland  
T +44 28 90 310 655  
[belfast@davy.ie](mailto:belfast@davy.ie)

### London Office

Dashwood House  
69 Old Broad Street  
London EC2M 1QS  
United Kingdom  
T +44 207 448 8870  
[london@davy.ie](mailto:london@davy.ie)

### Cork Office

Hibernian House  
80A South Mall  
Cork  
Ireland  
T +353 21 425 1420  
[cork@davy.ie](mailto:cork@davy.ie)

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