

# Wills, Probate & Elderly Client Services



**Inspired by You**





The peace  
of mind and  
assurance  
you need

**Wills, Probate  
& Elderly  
Client Services**

“Making a Will is a great comfort to most people because there is a sense of security in seeing their intentions set out in black and white.”

Tom Morrish, Partner

### Estate Administration

After a loved one dies, there are many urgent duties to attend, such as registering the death, notifying authorities and ceremonial arrangements. But how are the financial affairs of the deceased to be handled? Our expert solicitors will take you through each step of Estate Administration, including the Will or intestacy, probate, income tax and inheritance tax, to help you smooth the transition after losing a loved one.

Our team of specialist solicitors is committed to promoting the needs of elderly clients, and Tom Morrish, Partner, is Regional Coordinator for Solicitors For the Elderly.

### Lasting Power of Attorney

LPAs allow you to appoint another person to make decisions for you in the event you lose mental capacity. Making an LPA can be complex and it is vital to ensure the Power is completed correctly, to avoid it being declared invalid. Appointed Attorneys must follow the Code of Practice contained in the Mental Capacity Act 2005.

We are able to visit you or your family member in whichever location is convenient for you, be it at home, hospital or a care home.

### Elderly Client

Elderly clients can be very vulnerable, and need robust, comprehensive and independent legal advice to cater for their needs and enable them to control their own circumstances, for as long as they have the capacity to do so. They and their families need access to expert legal advisors who will protect and defend their best interests. This may encompass the need for:

- > Advice for Cost of Care
- > Advice on Dementia
- > Advice on Mental Capacity
- > A Living Will
- > Lasting Power of Attorney

### Wills

No one wants to write a Will that could be declared invalid when the time comes. A Will is the only way to ensure your loved ones inherit what you want them to have. It is advisable for other reasons, such as to avoid intestacy, appoint Guardians and Executors of your Will, mitigate inheritance tax or donate to a favoured charity. Above all, it gives you peace of mind.

A properly drafted Will should reduce the chance of dispute about your estate after death. Our team of specialist lawyers takes the time to talk you through each step of the process, to achieve the end result as you intend.

### Inheritance Tax

The tax which applies to the value of your estate on death is known as Inheritance Tax (IHT). Its effects can be savage. Anything in your Will that is left to a spouse or charity is exempt from IHT, but otherwise tax is 40% on the value of your estate above the Nil Rate Band, which can change from time to time. If your estate is likely to exceed the Nil Rate Band, you should seek professional advice as there are many legal ways of mitigating the effects of this Tax, such as lifetime gifts, a clear Will, Trusts, and Deeds of Variation.

For more information on any of the above, call our Wills, Probate and Elderly Client team on **033 3344 9600**

You are also welcome to refer to the Fact Sheets and reference library on our website **[www.morrishsolicitors.com](http://www.morrishsolicitors.com)**

Inspired by our clients, confident in our expertise and fair employment practices, as approachable as we are professional, we aspire to provide the best legal service in the UK for people when they need it most.

Our areas of expertise include:

- > Employment Rights
- > Clinical Negligence
- > Injury Claims & Occupational Disease
- > Family Law
- > Asbestos
- > Property Services
- > Wills, Probate and Elderly Client Services
- > Professional Negligence
- > Trade Union Services

**Yeadon Office**

61 High Street, Yeadon, Leeds, LS19 7SP

T: 033 3344 9600

F: 0113 250 0289

E: [info@morrishsolicitors.com](mailto:info@morrishsolicitors.com)

**Pudsey Office**

9 Lowtown, Pudsey, Leeds, LS28 7BQ

T: 033 3344 9600

F: 0113 257 1517

E: [qs@lindleyclough.co.uk](mailto:qs@lindleyclough.co.uk)

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