



richardson swift

Inheritance Tax Services

"In this world, nothing is certain except death and taxes."

This is still as true today as it was when Benjamin Franklin said it in 1789.

When someone passes away it will fall to the executors of the deceased's Will to begin the process of working out the inheritance tax and administering the estate.

Until recently, the process of obtaining probate has always required the services of a solicitor, now however, the Institute of Chartered Accountants in England and Wales can grant licences to suitably qualified accountancy firms to offer non-contentious probate services. Richardson Swift is among those firms that can now offer this service.

Our Probate Service

We offer a bespoke, cost-effective, and professional probate service that covers all aspects of estate administration for our clients. Our flexible service means you can choose for us to assist with as much of as little as you need.

What it includes:

- working with the Executors to assist with legal responsibilities
- handling taxation issues up to the date of death
- collecting details of the deceased's assets and liabilities & obtaining professional valuations where required
- completing inheritance tax accounts and forms
- claiming any available tax reliefs or exemptions and calculating the tax payable
- applying for and obtaining the grant of probate or guiding you through the process
- dealing with capital gains and income tax liabilities of the estate
- preparing tax returns through the administration period
- identifying any potential tax savings through a variation of the Will
- Planning the tax efficient distribution of assets to beneficiaries
- preparing the final estate accounts



To find out more about our personal tax services, IHT & probate, contact director Calvin Healy for a free initial discussion. Email Calvin on ch@richardsonswift.co.uk or call 01225 325580.

About Us

We are the largest independently-owned accountancy practice based solely in Bath. We specialise in advising owner managed businesses, private individuals and their families. And pride ourselves on providing great service and innovative solutions.

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