

F O'Gorman Esq
6 Eddeys Lane
Headley Down
Hants
GU35 8HU

Our Ref: AJM/AP
Your Ref:
Direct E-mail: a.montella@bellspotter.co.uk
Date: 16 July 2002

Dear Mr O'Gorman,

Thank you for instructing this firm to prepare your Will.

Responsibility for the work

I shall carry out most of the work in this matter personally, but you can also contact my Secretary, Mrs Angela Passey, who will be familiar with the file. If she is unable to help you herself she will be pleased to take a message for you. The partner of this firm with ultimate responsibility for this matter is Mrs Vivien Phillips. We aim to offer all of our clients an efficient and effective service and I am confident that we will do so in this case. However, should there be any aspect of our service with which you are unhappy, and which we cannot resolve between ourselves, you may raise the matter with Mrs Phillips.

Fees

Our fees are as set out in the attached overview of our will service. These charges are subject to the addition of VAT at the standard rate.

The charges that we will be making in this matter as referred to above, cover the work that we have been instructed to undertake. If we are instructed to undertake further work we would need to make additional charges and I would provide you with an estimate of what they would be.

Should this matter not be carried through to completion then a charge will be made in respect of the work that has already been completed. VAT will be payable on that amount and you would also be billed for any disbursements incurred. Depending upon the amount of work done, this may be a small proportion of the charges referred to above, or may be almost the full amount.



Most of our clients like us to store their Will in our Strong Room when it has been completed. We charge a single fee of £12.50 per document or £15.00 for mirror image Wills at the time your Will goes into storage for its storage and custody. We will add this amount to your final account unless you instruct us to the contrary and indicate that you will wish to take away your Will when it has been completed. These fees do not apply if your Will is already stored with the firm.

Terms of Business

We shall deliver a bill to you on completion of your Will for the work carried out during the conduct of the case. Accounts should be settled within 30 days. Interest will be charged on bills that are not paid within that time at 8%.

As confirmation that you would like us to proceed on this basis I should be grateful if you would sign the extra copy of this letter enclosed and return it to me. We will then have entered into an agreement which means that the firm's fees, as set out above, will be fixed. Given this agreement, your rights in law to challenge the amount of my firm's fees will be restricted.

Yours sincerely,

Anne J. Montella

MRS A J MONTELLA

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OUR WILL SERVICE – AN OVERVIEW

Making a Will allows you to determine who will benefit from your estate on death. If you do not make a Will, everything you leave (your *estate*) will go to your next of kin according to the rules of *intestacy* and, in some cases, in fixed amounts. A Will allows you to choose your own *Executors* (who take charge of your estate, collect your assets, pay off any debts and distribute the *residue*) and appoint *guardians* for young children. It can also save a considerable amount of *Inheritance Tax* for married couples.

Before we can prepare your Will, we need to clarify your personal circumstances and individual requirements in order to ensure that the Will reflects your true intentions. We appreciate that everyone's requirements are different and that careful attention needs to be paid to all relevant factors, which can be discussed in person at our initial meeting.

As we are often dealing with house deeds and indeed the storage of documents generally, as part of our advice we set out our fees below.

Should you have any queries regarding this service, or indeed any other issues, please do not hesitate to contact one of the following:

Vivien Phillips (Probate Partner)
David Richardson (Probate Manager)
Paul Willans (Financial Planning Manager)

Anne Montella (Solicitor)
Elaine Whitham (Probate Manager)
Norman Kidd (Consultant)

OUR FEES

For advising on and preparing a single Will	£ 95.00
For advising and preparing two Wills on a "mirror image basis"	£125.00
For advising on and preparing two "mirror image" Wills including Provision for Discretionary Trusts	£250.00
For preparing a Codicil	£ 50.00
For preparing "mirror image" Codicils	£ 70.00
For advising on and preparing a single Enduring Power of Attorney	£ 75.00
For advising on and preparing two "mirror image" Enduring Powers of Attorney	£100.00
For arranging Notice of Severance of jointly held property	£ 50.00

Complex matters and other requirements may be charged on a time basis in accordance with our prevailing Services and Terms. In such cases we will provide an estimate of our likely fees before proceeding

Our Wills service extends only to Wills that have been signed and witnessed under our supervision, either at our offices or at your home. In the event that the signing of your Will is to be unsupervised, we cannot be responsible for any defects that may arise in the execution of the Will

All prices quoted above are subject to VAT at 17.5 %

Storage indefinitely per item inclusive of VAT:

Will	£ 12.50
Mirror image Wills	£ 15.00
Enduring Power of Attorney	£ 12.50
Mirror image Enduring Powers of Attorney	£ 15.00
House deeds	£ 37.50

BELLS POTTER

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