



Comprehensive Probate Support Service

JM Finn & Co was founded in 1945 and is one of the UK's leading investment management companies with offices in London, Bristol, Leeds, Bury St Edmunds, Ipswich and Cardiff.

We offer services which are both flexible and objective and designed to suit our clients' needs.

The JM Finn & Co Probate Service offers support in dealing with a deceased estate. We offer a comprehensive range of probate services in partnership with one of the UK's foremost specialist research organisations, whose services are endorsed by the Law Society of England and Wales.

Probate valuations

This service includes:

- **Valuations completed promptly to comply with IHT and Confirmation purpose**
All valuations are produced to facilitate the completion of IHT 200 and relevant D schedules. For Scottish valuations we also produce the corresponding schedules to complete schedules C1 and C2 for Confirmation purposes.
- **Full ex-dividend and interest payment data**
A detailed schedule of all dividends, interest and other distributions is included as standard.
- **All listed foreign investments**
This includes all investments not listed on the London Stock Exchange but listed on other stock exchanges around the world. All appropriate exchange rates are also included.
- **Private companies and unquoted investments**
This includes municipal bonds, corporate bonds and private companies. We obtain the values and provide the supporting documentation.
- **Depending on complexity we aim for a 7 day service.**

Probate support

- **Verification of assets**
We can identify, confirm and evaluate all known investments wherever they are located.
- **Registration of death**
We can register the death in relevant jurisdictions and advise on local probate requirements.
- **Registration of the grant of probate and reseals**
We can register the grant of probate with all interested parties and, where applicable, arrange for the grant to be resealed.
- **Transferring the assets**
We can prepare all the appropriate documentation to facilitate the transfer of assets to the executors or beneficiaries.

Other services we can arrange

- Estate accounts
- IHT documentation
- Dividend schedules
- Arrange transfer/sale of assets
- Letters of indemnity and surety bonds
- Reseal probates
- Statutory documentation
- Duplicate birth, marriage or death certificates
- Copy wills and probate
- Translations

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