

Share Services

A comprehensive range of share services helping you provide clients an efficient and cost-effective process, supported by our knowledge and experience.

Share Valuation - £6 + VAT per holding

- Probate valuations of shares at date of death.
- Identification of Ex-Dividends (XD) due at date of death.
- Valuation calculated using ¼ up method in line with HMRC requirements.
- Provide details of company name changes and acquisitions where relevant.

Share Verification - £6 + VAT per holding

- Verification of the number of holdings held at date of death and present date.
- Verification if the shares are held in certificated or nominee form.
- Verification of currently valid share certificates
- Written confirmation of the shareholdings.

Share Sales - £40 + VAT per holding (plus brokerage fees)

- Registration of the Grant of Representation.
- Verification of valid Share Certificates
- Preparation of all appropriate forms.
- Select most cost-effective sale route
- Effect the sale of the shareholdings.
- Funds sent to your designated bank account.

Share Transfer - £40 + VAT per holding

- Registration of the Grant of Representation.
- Verification of valid Share Certificates
- Preparation of all appropriate forms.
- Obtain certificates in the name of the transferee.
- Share certificates sent to instructing professional

Schedule of dividends - £6 + VAT per dividend

- A schedule of dividends paid during a tax year or years, or a specific time-period.

Missing Share Certificates and Countersignatures on letter of indemnity – £POA

- Share value less than £50,000 obtaining letter of indemnity and replacement certificates from registrar.
- Share value more than £50,000 providing countersignature on letter of indemnity to enable sale of shares.