

Why Hugh James?

Hugh James have a large and experienced wills, trusts and legal services team who specialise in all matters relating to estate planning.

They are a top 100 UK law firm, with over 50 years' experience and 600 staff members specialising in legal matters, but they still keep a personal, down-to-earth approach, based on finding the right solutions for their clients.

Help and Guidance Following Bereavement

If a member of your family who holds an account with YBS has passed away, we want to help and support you and your family and make any dealings with us as simple as possible. We have produced a Bereavement Guide to support the Personal Representative, Executor and the joint account holder of the deceased to help you through the process and provide the support you need. It explains who you need to inform and what information you need on the deceased. Ask for details in branch or visit ybs.co.uk/help/bereavement to download a copy.

Our printed material is available in alternative formats e.g. large print, Braille or audio. Please contact your local branch or call us on **0345 1200 100**.


Will writing and legal services are not regulated by the Financial Conduct Authority. All communications may be monitored or recorded to improve the quality of our service and for your protection and security. Calls to 03 numbers are charged at the same standard network rate as 01 or 02 landline numbers, even when calling from a mobile. Charges to third party numbers may vary. Prices can be checked with the relevant company.

Yorkshire Building Society is a member of the Building Societies Association and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Yorkshire Building Society is entered in the Financial Services Register and its registration number is 106085. Head Office: Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ.

Yorkshire Building Society chooses to introduce its customers to Hugh James Solicitors for the purposes of advising on and arranging will writing and legal services administration. Hugh James Solicitors (VAT No. 134 1882 76) is authorised and regulated by the Solicitors Regulation Authority (SRA Number:303202) and is authorised and regulated by the Financial Conduct Authority. Established in the UK, the firm is responsible for compliance with the solicitors rules – available online at <http://www.sra.org.uk>

LEGAL SERVICES HELPLINE

Supporting you after the death of a loved one.



We understand that it can be hard to know where to start following the loss of family or a friend. At an already difficult time, dealing with the estate can be the last thing you want to think about.

There may be a number of things that will need to be organised when somebody passes away, including what happens to that individual's possessions, property and money. Administration of an estate can be complex, confusing and time consuming.

That's why we work with Hugh James to offer our customers access to an Estate Administration Service, which is a specialist service handling all the processes and paperwork after someone passes away.

They can provide help in a range of ways; from certain property issues, helping with paperwork and ensuring any funds are distributed accordingly. The next page provides more information on the different types of help available.

Hugh James can help with:

- writing to all asset and liability holders to confirm the financial details at the date of death
- ensuring any property is secured and insured;
- identifying the beneficiaries;
- completing relevant Inheritance Tax, income tax and capital gains tax forms as appropriate;
- arranging to close bank accounts, investments and receiving the closing balances;
- arranging the sale of any property or transfer of it to the beneficiaries;
- preparing and sending the estate for approval;
- distributing the assets of the estate;
- ensuring the appropriate tax reliefs are claimed;
- dealing with overseas lawyers if required;
- resolving disputes.

Hugh James know that everyone's circumstances are different, so for more information or advice please call the legal helpline to discuss the help available.

Legal services helpline

For Estate clarity, guidance and practical support to help give you peace of mind at this difficult time, call Hugh James on the number below

 **0330 053 6225**

Monday to Friday, 8am to 8pm, Saturday, 9am to 1pm.

