



Your Guide to our Private Client Services



TAYLOR
ROSE

SMART
MODERN
LAW

WHY CHOOSE US?

At Taylor Rose we offer something completely different...

Our Private Client Team at Taylor Rose offers a wide range of legal advice and services.

We pride ourselves on **delivering an excellent service** and in doing so, our team understands the needs and concerns of our clients.

We offer an experienced and valued legal service at a **reasonable cost**, no matter how complex the matter.

Read more about our services in this brochure and get in touch with an expert you can trust.

OUR SERVICES

Wills

Lasting Powers of Attorney

Probate

Trusts

Court of Protection



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[Malina] was professional though friendly too in her approach, providing excellent help in reviewing and writing my Will. She also took the time to explain areas I may have been unsure of.

Google Review

For the complete review and more, please visit our Google Reviews.

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[Jacob] advice and dealing with the matter at hand, made it very easy for me and my mum to understand, what our best options were, and moving forward. He forwarded information very well, and was very prompt in his services. I would recommend Taylor Rose to other people. Thank you again!

Google Review

For the complete review and more, please visit our Google Reviews.



WILLS

A Will is a legal document which allows you to choose who will benefit from your Estate when you die.

If you die without a Will, this means that you are then intestate. The intestacy rules will decide who **benefits from your Estate** and this is not always who you would have wanted to benefit.

Your Will should cover all of the assets in your Estate. It is a good idea to prepare a list

of all the things you own (assets) as well as a list of all the debts you owe. Then you have a clear idea of how much your Estate is worth.

Your Will needs to state clearly who you want to be responsible for dealing with the Estate (this person is known as an ‘Executor’) as well as who you want your assets to be passed down to (known as the ‘Beneficiaries’).

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[Malina] is a very friendly and knowledgeable person who gave me excellent information and advice. Communication was great and everything was completed very efficiently. Would not hesitate to contact her again for advice and assistance.

Google Review

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LASTING POWERS OF ATTORNEY

A Lasting Power of Attorney (LPA) is a **legal document** that allows you to appoint one or more individuals (referred to as 'Attorneys') to assist you with your affairs. This may involve **helping you to make decisions**, acting on your behalf or managing your matters and finances when you are unable to do so yourself.

This gives you **more control over what happens** to you if you have an accident or illness and cannot make your own decisions, i.e. you 'lack the mental capacity' to make decisions for yourself.

By completing an **LPA**, it means you get to choose a person (or people) you trust who you would want to be able to deal with things for you.



PROBATE

A Grant of Probate, or Letters of Administration (where there is no Will) is a **legal document that gives authority to manage** and distribute a person's property, money, and possessions (collectively referred to as their 'Estate') after they die. It confirms the legal right of the person(s) named in the Grant to act on behalf of the deceased.

Probate is important because it provides official recognition that the Executors or Administrators have the legal authority to access bank accounts, sell property, pay debts, and distribute assets to beneficiaries.

Without a Grant most institutions will not allow access to the deceased's assets, which can cause delays and complications in settling the Estate.



We can help guide you through the entire probate process—from completing the necessary forms and calculating any inheritance tax, to applying for the Grant and administering the Estate.

Our team ensures everything is handled efficiently, accurately, and in accordance with the law, helping ease the burden during a difficult time and reducing the risk of costly mistakes or delays. Whether you need assistance with part of the process or would like us to manage everything on your behalf, we're here to support you every step of the way.

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When [my brother passed], I was daunted by the task ahead of me, but Taylor Rose arranged clearance of his rental property, finalised his few debts, chased money owed and made sure that all Government agencies were informed, as required. It's been a rare and difficult circumstance for both me and Taylor Rose, but I am very grateful that they were there for our family, and I cannot recommend them more highly enough.

Google Review

For the complete review and more, please visit our [Google Reviews](#).

TRUSTS

Trusts come in many forms, but in summary these are ways in which to keep assets held and managed by one person or people (known as 'Trustees') to benefit another person or people (referred to as 'Beneficiaries').

The person providing the assets is called the Settlor. **Different kinds of assets can be put in a trust**, including cash or property.

Trusts are complex and there can be significant tax implications when Trusts are created and also on a regular ongoing basis. It is therefore important to **obtain specialist advice** when you are considering putting assets into a Trust to make sure that it is a benefit to you and your family.

Most **Trusts** now have to be accounted to HMRC, whether or not there is tax to pay on those Trusts.



COURT OF PROTECTION

The Court of Protection deals with applications where a person lacks mental capacity and there is not already a Power of Attorney in place.

Those applying to help (referred to as a “Deputy”) the person who lacks capacity must make their application to the Court and state the assets that are needed to look after the person in question.

The application requires a professional to complete a capacity assessment of the person to confirm that they lack mental capacity.

The Court will then **issue an order** to the Deputy stating what they are able to do under the Order. For example, manage financial affairs and/or sell property etc.

A Deputy will need to file annual accounts to the Court to show how they have dealt with the financial affairs.

The costs linked to a Deputyship application are significantly more than setting up a Lasting Power of Attorney.



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[Jacob] has always been quick, responsive, accurate and helpful. I can't fault his legal knowledge and expertise and he has always taken the time to explain areas that have been unclear to me. I have no hesitation in recommending him.

Google Review

For the complete review and more, please visit our Google Reviews.

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[Krystal] took away all my stresses and my probate was granted within 6 months. I would highly recommend, excellent service.

Google Review

For the complete review and more, please visit our Google Reviews.

GLOSSARY

Administrators

Those who deal with an Estate where there is no Will.

Beneficiary

The person who benefits from an Estate or Trust.

Debt

Any money due back from an Estate.

Deputy

A person appointed by the Court of Protection to make decisions on behalf

of someone who lacks the mental capacity to make those decisions themselves.

Estate

All of the money, property, possessions, and other assets you own at the time of your death, minus any debts or liabilities.

Executor

The person named in a Will to deal with the Estate.

Grant of Probate

An official document to give authority to the Executor to deal with the Estate.

Intestacy

If someone dies and does not leave a valid Will.

Settlor

The person who creates a Trust.

Trustees

The people appointed to deal with a Trust.

MEET THE TEAM



> JACOB ROBINSON
PARTNER & HEAD OF
PRIVATE CLIENT

Jacob brings a strong foundation in private client work, focusing on tailored solutions for his clients. He specialises in Wills and Probate, Estate Planning, Powers of Attorney, Court of Protection, and Trust matters.

Jacob is a member of the Society of Trust and Estate Practitioners (STEP) and provides expert guidance in Wealth Management and Estate Administration.

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*Scan the QR code to
view Jacob's profile*



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At Taylor Rose, we're here to support you with a full range of legal services, tailored to your needs. If you would like more information or you'd like to instruct us, please get in touch.



By telephone

020 3540 4444



By email

info@taylor-rose.co.uk



Visit our website

taylor-rose.co.uk

The information provided in this brochure is for general informational purposes only and does not constitute legal advice. While we strive to ensure accuracy, laws and regulations may change, and individual circumstances vary. We strongly recommend consulting with a qualified legal professional before making any decisions related to your legal matters.

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