Our **estate and probate** valuation service at a glance

At Canaccord Genuity Wealth Management (CGWM) we offer a comprehensive estate and probate valuation service, to support both legal professionals and executors acting independently.

Our highly experienced team will provide quality advice and help you by undertaking some of the most specialist administrative tasks. We will act efficiently and quickly, bringing you the accurate information you need as soon as possible.

We'll work closely with you to provide a fee-based and stress-free service for your clients, offering them convenience and reassurance at a difficult and sensitive time.

What does this service include?

We prepare probate valuations as at the date of death, based on either a list of stocks or copies of the share certificates. This will include an explanation for any holdings which are no longer valid (for example, if a company has been taken over).

We'll look at the deceased's estate and provide the data you need to calculate:

- The amount of inheritance tax due
- Any capital gains on assets sold (if the deceased has realised profits in their year of death)
- The value of any bequests of assets as specified in the Will.

What other probate services do you provide?

- We can liaise with the relevant registrars on your behalf, to verify the estate's holdings
- We can arrange to sell shares and liquidate the estate's investments quickly and seamlessly on behalf of the executors, beneficiaries or trustees.

What if the trustees or beneficiaries want to keep some of the investments?

It may well be more advantageous to keep some of the estate's underlying investments rather than liquidate everything. If so, we can give your clients access to a range of CGWM services, including discretionary portfolio management, advisory stockbroking[1] and financial planning[2].

Our advice, and any arrangements we make on your clients' behalf, will be focused on their life goals, the financial outcomes they want, and the timeframe in which they want to achieve them. For example, we can help your clients rebalance their inherited portfolio in line with their own (or a trust's) objectives and risk profiles.

[1] Our investment management service is deemed to be 'restricted' as we do not provide advice in respect of pensions, mortgages, loans or life insurance products.

[2] Our financial planning service is 'independent' and fee based, which means your Financial Planner isn't tied to any specific provider or products.

Important information

Investment involves risk. The value of investments and the income from them can go down as well as up and you may not get back the amount originally invested.

How can we help?

If you'd like to know more about how we can help with your estate and probate valuation needs, please get in touch. We'll be delighted to answer your questions, explain how we can work together for the benefit of your clients, and provide full details of our services.

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Guildford
Lancaster
Llandudno
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Newcastle
Norwich
Nottingham
Southampton
Worcester
York

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Important information

Investment involves risk. The value of investments and the income from them can go down as well as up and investors may not get back the amount originally invested. The investments and services described in this brochure may not be suitable for all investors. Investors should make their own investment decisions based upon their own financial objectives and financial resources and, if in any doubt, should seek advice from an investment adviser.

This document is for information only and is not to be construed as a solicitation or an offer to purchase or sell investments or related financial instruments. This has no regard for the specific investment objectives, financial situation or needs of any specific investor.

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