

# Price List

England & Wales 2026



# Single Persons – Pricing for Core Solutions

The main solution and price is shaded yellow, optional extras are listed directly below.

Protecting Assets That Pass via the Will	
<b>Beneficiary Protection Plan (BPP) for Single Persons</b> Includes advice, an integrated Will, one Solidus Beneficiary Protection Trust (BPT), Letter of Wishes, RNRB advice considered, client binder of advice and copy documents	<b>£720+VAT</b>
<b>Additional BPTs</b> The basic plan includes one Trust that all beneficiaries can share but clients with multiple children often prefer to set up a Trust per child	<b>£350 +VAT each</b>
Protecting Pension Death Benefits and DIS	
<b>Asset Preservation Trust (APT)</b> Includes advice, Solidus APT and provider notices	<b>£245+VAT</b>
<b>Letter of Wishes (recommended)</b>	<b>£70+VAT</b>
Protecting Lifetime Gifts	
<b>Single Settlor Protective Gifting Trust Solution (PGT)</b> Includes advice and Solidus PGT. Client will then need to transfer a property or funds into the Trust	<b>£395+VAT</b>
<b>Letter of Wishes (recommended)</b> If more than one PGT is set up e.g. one per child, only one Wishes letter is required	<b>£70+VAT</b>
<b>Loan Assignment and Agreement</b> If clients have already made (or are about to make) a loan to a beneficiary, this can be assigned to the Trustees and then an agreement signed to formalise the terms of the loan once the money is owed back to the Trust. This avoids the need for a Trustee bank account	<b>£340+VAT</b>

## Lasting Powers of Attorney (LPA)

<b>Health &amp; Welfare LPA (including Registration with OPG)</b> Includes advice, preparation of LPA, liaison with all parties and OPG costs	<b>£285+VAT</b>
<b>Property &amp; Affairs LPA (including Registration with OPG)</b> Includes advice, preparation of LPA, liaison with all parties and OPG costs	<b>£285+VAT</b>
<b>LPA without registration</b> Includes preparation of LPA, clients would then need to liaise with all parties and submit to the OPG for registration along with their fee	<b>£185+VAT</b>

## Recommended Services for All of the Above

<b>Secure Document Storage</b> Eight-year secure storage of signed documents from all the client's Solidus solutions	<b>£95+VAT</b>
<b>Trust Registration – 24 Month Support Service</b> Includes: any required updates for 24 months, trust alerts, annual e-newsletter	<b>£120+VAT per Trust</b>

# Legal Partnership – Pricing for Core Solutions (Married Couples and Civil Partnerships)

The main solution and price is shaded yellow, optional extras are listed directly below

<b>Protecting Assets That Pass via the Will</b>	
<p><b>Beneficiary Protection Plan (BPP) for Legal Partnerships</b> Includes advice, two integrated Wills, one Solidus Beneficiary Protection Trust (BPT), Letter of Wishes, RNRB advice considered, client binder of advice and copy documents</p>	<b>£985+VAT</b>
<p><b>Additional BPTs</b> The basic plan includes one Trust that all beneficiaries can share but clients with multiple children often prefer to set up a Trust per child</p>	<b>£350+VAT</b>
<p><b>Business Planning for one partner with qualifying business or agricultural assets</b></p>	<b>£630+VAT</b>
<p><b>Business Planning for both partners with qualifying business or agricultural assets</b></p> <p>Assets that qualify for Business or Agricultural Relief can be directed into Trust free of IHT on first death instead of adding to the survivor's estate. Includes advice, additional Will drafting and one/two Business Trusts with Trust Registration</p>	<b>£930+VAT</b>
<p><b>Nil Rate Band Will Trust advice and drafting</b> Suggested for most clients. The value of the first to die's NRB is directed into Trust. The surviving spouse can benefit from capital and income but assets do not form part of their estate, providing potential protection and IHT savings</p>	<b>£100+VAT</b>
<p><b>Life Interest planning</b> If required to protect the first to die's estate above the value of the NRB or in blended family situations where each spouse wants their estate to go to different beneficiaries on second death. The surviving spouse can benefit from income but the capital is protected for the ultimate beneficiaries e.g. children</p>	<b>£100+VAT</b>
<p><b>Life Interest in Property only (can't be combined with NRB planning)</b> The surviving spouse can remain living in the main residence, move house or downsize but the capital value of the property is protected for the ultimate beneficiaries e.g. children</p>	<b>£100+VAT</b>

<p><b>Option to 'bank' Residence Nil Rate Band (RNRB) on first death advice and drafting</b></p> <p>For joint estates approaching or exceeding £2m where the allowance may otherwise be lost on second death</p>	<p><b>£200+VAT</b></p>
<p><b>Deed of Severance to change property ownership to Tenants in Common (TinC)</b></p> <p>Required if not already owned as TinC and clients are doing any first death planning</p>	<p><b>£160+VAT</b></p>

## Protecting Pension Death Benefits and Death in Service (DiS)

<p><b>Asset Preservation Trust (APT) – a Trust each if both have pensions/DiS</b></p> <p>Includes advice, Solidus Asset Preservation Trust and provider notices</p>	<p><b>£245+VAT</b></p>
<p><b>Letter of Wishes (recommended)</b></p>	<p><b>£70+VAT</b></p>

## Protecting Lifetime Gifts

<p><b>Joint Settlor Protective Gifting Trust Solution (PGT)</b></p> <p>Includes advice and Solidus PGT. Client will then need to transfer a property or funds into the Trust</p>	<p><b>£530+VAT</b></p>
<p><b>Letter of Wishes (recommended)</b></p> <p>If more than one PGT is set up e.g. one per child, only one Wishes letter is required</p>	<p><b>£70+VAT</b></p>
<p><b>Loan Assignment and Agreement ( one per Trust/Beneficiary)</b></p> <p>If clients have already made (or are about to make) a loan to a Beneficiary, this can be assigned to the Trustees and then an agreement signed to formalise the terms of the loan once the money is owed back to the Trust. This avoids the need for a Trustee bank account</p>	<p><b>£340+VAT</b></p>

## Lasting Powers of Attorney (Per Person)

<p><b>Health &amp; Welfare LPA (including Registration with OPG)</b></p> <p>Includes advice, preparation of LPA, liaison with all parties and OPG costs</p>	<p><b>£285+VAT</b></p>
<p><b>Property &amp; Affairs LPA (including Registration with OPG)</b></p> <p>Includes advice, preparation of LPA, liaison with all parties and OPG costs</p>	<p><b>£285+VAT</b></p>
<p><b>LPA without registration</b></p> <p>Includes preparation of LPA, clients would then need to liaise with all parties and submit to the OPG for registration along with their fee</p>	<p><b>£185+VAT</b></p>

## Solidus Trusts Plan

<p><b>Solidus Trusts Plan (for Legal Partnerships with High Net Worth Estates)</b> This premium plan includes NRB planning, two integrated Wills, two Wishes Letters, two Solidus Trusts, RNRB advice considered, tenants in common on main property, client binder of advice, copy documents and secure document storage</p>	<p><b>£2,090+VAT</b></p>
<p><b>Additional Beneficiary Protection Trusts (BPTs)</b> The basic plan directs the NRB into one Solidus Trust on first death and the residue into the other Solidus Trust on second death, all Beneficiaries would share both Trusts. Or BPTs can be added so the Beneficiaries can have a Trust each on second death and the unused Solidus Trust can be used for gifting</p>	<p><b>£350+VAT</b></p>
<p><b>Business Planning for one partner with qualifying business or agricultural assets</b></p> <p><b>Business Planning for both partners with qualifying business or agricultural assets</b></p> <p>Assets that qualify for Business or Agricultural Relief can be directed into Trust free of IHT on first death instead of adding to the survivor's estate Includes advice, additional Will drafting and one/two Business Trusts</p>	<p><b>£630+VAT</b></p> <p><b>£930+VAT</b></p>
<p><b>Life Interest advice and drafting</b> If required to protect the first to die's estate above the value of the NRB or in blended family situations where each spouse wants their estate to go to different beneficiaries on second death. Surviving spouse can benefit from income but the capital is protected for the ultimate beneficiaries e.g. children</p>	<p><b>£100+VAT</b></p>
<p><b>Option to 'bank' Residence Nil Rate Band (RNRB) on first death advise and drafting</b> For joint estates approaching or exceeding £2m where allowance may otherwise be lost on second death</p>	<p><b>£200+VAT</b></p>

## Recommended Services for All of the Above

<b>Secure Document Storage</b> Eight-year secure storage of signed documents from all the client's Solidus solutions	<b>£95+VAT</b>
<b>Trust Registration – 24 Month Support Service</b> Includes: any required updates for 24 months, trust alerts, annual e-newsletter	<b>£120+VAT per Trust</b>

# Cohabiting Partners – Pricing for Core Solutions

The main solution and price is shaded yellow, optional extras are listed directly below

Protecting Assets That Pass via the Will	
<b>Beneficiary Protection Plan (BPP) for Cohabiting Partners</b> Includes advice, two integrated Wills, two Solidus Beneficiary Protection Trust (BPTs), two Letters of Wishes, RNRB advice considered, client binder of advice and copy documents	<b>£1,440+VAT</b>
<b>Additional BPTs</b> The basic plan includes one Trust for each client that all their beneficiaries can share. Additional Trusts can be added if required so Beneficiaries' funds can be managed separately	<b>£350+VAT</b>
Protecting Pension Death Benefits and DIS	
<b>Asset Preservation Trust (APT) – one Trust each if both have pensions/DIS</b> Includes advice, Solidus Asset Preservation Trust and provider notices	<b>£245+VAT</b>
<b>Letter of Wishes (recommended)</b>	<b>£70+VAT</b>
Protecting Lifetime Gifts	
<b>Single Settlor Protective Gifting Trust Solution (PGT)</b>	<b>£395+VAT</b>
<b>Joint Settlor Protective Gifting Trust Solution (PGT)</b>  Includes advice and Solidus PGT. Client will then need to transfer a property or funds into the Trust	<b>£530+VAT</b>
<b>Letter of Wishes (recommended)</b> If more than one PGT is set up e.g. one per child, only one Wishes letter is required	<b>£70+VAT</b>

<p><b>Loan Assignment and Agreement (one per Trust/Beneficiary)</b>          If clients have already made (or are about to make) a loan to a Beneficiary, this can be assigned to the Trustees and then an agreement signed to formalise the terms of the loan once the money is owed back to the Trust. This avoids the need for a Trustee bank account</p>	<b>£340+VAT</b>
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<b>Lasting Powers of Attorney (Per Person)</b>	
<p><b>Health &amp; Welfare LPA (including Registration with OPG)</b>          Includes advice, preparation of LPA, liaison with all parties and OPG costs</p>	<b>£285+VAT</b>
<p><b>Property &amp; Affairs LPA (including Registration with OPG)</b>          Includes advice, preparation of LPA, liaison with all parties and OPG costs</p>	<b>£285+VAT</b>
<p><b>LPA without registration</b>          Includes preparation of LPA, clients would then need to liaise with all parties and submit to the OPG for registration along with their fee</p>	<b>£185+VAT</b>

<b>Recommended Services for All of the Above</b>	
<p><b>Secure Document Storage</b>          Eight-year secure storage of signed documents from all the client's Solidus solutions</p>	<b>£95+VAT</b>
<p><b>Trust Registration – 24 Month Support Service</b>          Includes: any required updates for 24 months, trust alerts, annual e-newsletter</p>	<b>£120+VAT per Trust</b>

## Standalone Services – Pricing

Protecting Life Insurance Benefits	
<b>Assurance Trust (AST) – a Trust each if both have single policies, a joint Trust for joint policies</b> Includes advice, Solidus Assurance Trust and provider notices	<b>£200+VAT</b>
<b>Letter of Wishes (recommended)</b>	<b>£70+VAT</b>
<b>Relevant Life Plan Trust</b>	<b>£290+VAT</b>

Lifetime Gifting of Investment Bonds	
<b>Single Settlor Multiple Bond Trust (MBT)</b>	<b>£395+VAT</b>
<b>Joint Settlor Multiple Bond Trust (MBT)</b>  Includes advice, Solidus Multiple Bond Trust, option for regular withdrawals for the Settlor, one Deed of Assignment of Bond and provider notices	<b>£530+VAT</b>
<b>Letter of Wishes (recommended)</b>	<b>£70+VAT</b>

Simple Standalone Wills	
For clients with small estates that do not need Trust planning or as a temporary measure while clients decide on their full estate planning arrangements, we offer a limited but quality standalone Will service	
<b>Single person Will and Wishes Letter</b>	<b>£195+VAT</b>
<b>Single Person Standalone Will and Wishes Letter with Life Interest in Property</b>	<b>£295+VAT</b>
<b>Legal Partnership mirror Wills and Wishes Letters</b>	<b>£370+VAT</b>
<b>Legal Partnership mirror Wills and Wishes Letters with Life Interest in Property</b>	<b>£470+VAT</b>
<b>Deed of Severance</b> To change property ownership to Tenants in Common if not already (required for life interest in property planning)	<b>£160+VAT</b>

## Trust Registration Services

<b>Initial UK TRS Registration of any Trust</b>	<b>£120+VAT</b>
<b>Initial UK TRS Registration and 24 Month Support Service</b> 24 Month Support Service Fee includes: any required reporting for 24 months, trust alerts, annual e-newsletter	<b>£240+VAT</b>
<b>Adding 24 Month Support Service to any existing registered Trust</b> 24 Month Support Service Fee includes: any required reporting for 24 months, trust alerts, annual e-newsletter	<b>£120+VAT</b>
<b>Redraft of Trust Registration (per Trust)</b> If draft registrations are not approved by the client before they expire on the government's system, an additional fee will be payable to re-enter the registration details	<b>£60+VAT</b>

## Document Storage

<b>Secure Document Storage</b> Eight-year secure storage of signed documents from all the client's Solidus solutions	<b>£95+VAT</b>
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## Additional Services

<b>Deed of Appointment / Replacement of Trustees</b>	<b>£190+VAT</b>
<b>Deed of Addition of Beneficiaries</b>	<b>£190+VAT</b>
<b>Deed of Assignment of Loan to an existing Trust</b>	<b>£170+VAT</b>
<b>Loan Agreement</b>	<b>£170+VAT</b>
<b>Deed of Appointment of Capital</b>	<b>£490+VAT</b>
<b>Deed of Assignment of Policy to an existing Trust</b>	<b>£170+VAT</b>
<b>Updated Wills for existing plans</b>	<b>£190+VAT each</b>
<b>Updated Wills for existing plans adding NRB, life interest and/or RNRB planning</b>	<b>£250+VAT each</b>

<b>Updated Letter of Wishes existing client</b>	<b>£70+VAT</b>
<b>New Letter of Wishes for a new client</b>	<b>£95+VAT</b>
<b>Trustee minutes</b>	<b>£95+VAT</b>
<b>Tenants in Common per property as part of a plan</b>	<b>£160+VAT</b>
<b>Tenants in Common per property not as part of a plan</b>	<b>£230+VAT</b>
<b>Expedition of a case (we will prioritise a case at every stage throughout the process)</b>	<b>£300+VAT</b>

## Reprint and Correction Services

From time to time clients or advisers need documents to be reprinted due to a failure in the correct execution of the documents, client requires changes to planning after final approval, or occasionally documents are lost in the post. Solidus provide a chargeable reprint service which includes checking of the documents, printing and postage. Our reprint fees are as follows

<b>APTs, ASTs, PGTs, MBTs (per Trust)</b>	<b>£50+VAT</b>
<b>Beneficiary Protection Plans, Solidus Plans (including up to two Trusts)</b>	<b>£230+VAT</b>
<b>Incremental fee per additional Trust</b>	<b>£50+VAT</b>
<b>Incremental fee per additional Trust if redraft requires solicitor re-verification</b>	<b>£100+VAT</b>
<b>Individual Deeds, Loan Agreements</b>	<b>£30+VAT</b>
<b>Re-execution of Will If not executed in accordance with Solidus signing instructions (including Letter of Wishes, if required, and re-verification)</b>	<b>£50+VAT</b>
<b>Trust Registration redraft</b>	<b>£60+VAT</b>
<b>LPA redraft</b>	<b>£90+VAT per LPA</b>
<b>LPA reprint (e.g. if pages have been signed or dated incorrectly)</b>	<b>£50+VAT per LPA</b>

# Deed of Variation – Pricing

Deed of Variation Solutions	
<b>Deed of Variation of an Inheritance/Part of an Inheritance</b> Includes advice, a Deed of Variation, integrated post death Trust, Trustee Minutes and up to one Loan Agreement	<b>£1,180+VAT</b>
<b>Incremental Loan Agreement per additional Beneficiary</b>	<b>£170+VAT</b>
<b>Incremental Trust (if more than one Beneficiary varying their interest)</b> Includes Trustee Minutes	<b>£350+VAT</b>
Any property registration is incremental	<b>Please contact us for a quote</b>

<b>Deed of Variation Plan for a Surviving Spouse to add NRB/Life Interest planning</b> Includes advice, a Deed of Variation, integrated post death Trust and Trust Registration	<b>£1,180+VAT plus NRB fulfilment as below</b>
<b>Retrospective tenants in common for property or financial assets</b>	<b>£270+VAT</b>
<b>Incremental Trust (if more than one Beneficiary varying their interest)</b>	<b>£350+VAT</b>

<b>Deed of Variation to appoint assets to a direct descendant to claim RNRB, or to appoint the assets to a beneficiary absolutely</b> Includes advice and Deed of Variation	<b>£910+VAT</b>
<b>Legal Deeds on property ownership as required</b>	<b>from £750+VAT</b>

<b>Deed of Variation Plan for a Surviving Spouse to add NRB/Life Interest planning and appoint assets to a direct descendant to claim RNRB</b> Includes advice, a Deed of Variation and integrated post death Trust	<b>£1,640+VAT plus NRB fulfilment as below</b>
<b>Legal Deeds on property ownership as required</b>	<b>from £750+VAT</b>

# Fulfilment – Pricing

<b>Nil Rate Band Trust Fulfilment Services</b>	
<b>Nil Rate Band Trust fulfilled using a debt from a surviving spouse</b> Includes advice, Trustee Minutes and a Promissory Note	<b>£750+VAT</b>
<b>Nil Rate Band Trust fulfilled with a share of property</b> Includes advice, Trustee Minutes and all legal documentation	<b>£1,150+VAT</b>
<b>Nil Rate Band Trust fulfilled with property and a debt from surviving spouse</b> Includes advice, Trustee Minutes, a Promissory Note and all legal documentation	<b>£1,410+VAT</b>
<b>Initial Trust Registration</b>	<b>£120+VAT</b>

<b>Life Interest Trust Fulfilment Services</b>	
<b>Life Interest in liquid assets only</b> Includes advice, Deed of Appropriation, and Trustee Minutes	<b>£430+VAT</b>
<b>Life Interest including the main residence</b> Includes advice, Trustee Minutes and all legal documentation	<b>£1,150+VAT</b>
<b>Initial Trust Registration</b>	<b>£120+VAT</b>

<b>RNRB Fulfilment Services</b>	
<b>Appropriating assets to and appointing out of one Trust to a Beneficiary to claim RNRB</b> Includes advice, Trustee Minutes and all legal documentation	<b>£1,005+VAT</b>
<b>Incremental fee if appointments made from more than one Trust (per Trust)</b>	<b>£460+VAT</b>
<b>Legal Deeds on property ownership if being retained</b>	<b>from £750+VAT</b>
<b>RNRB appropriated to surviving spouse on life interest</b>	<b>£870+VAT</b>

## Beneficiary Protection Trust or Solidus Trust Fulfilment Services

<b>Trust fulfilled with liquid assets</b> Includes advice, Trustee Minutes and up to one Loan Agreement	<b>£750+VAT per Trust</b>
<b>Incremental Loan Agreement (if loans to more than one Beneficiary from one Trust)</b>	<b>£170+VAT</b>
<b>Additional fees for fulfilment with property</b> Executors should transfer property to the Trustees as part of the Probate process, but if a property has already been transferred to the beneficiary then additional work may be required.	<b>Please contact us for a quote</b>
<b>Initial Trust Registration (per Trust)</b>	<b>£120+VAT</b>

## Financial Trust Fulfilment Services

<b>Asset Preservation Trust Fulfilment</b> Includes advice, Trustee Minutes and up to one Loan Agreement	<b>£460+VAT</b>
<b>Assurance Trust Fulfilment</b> Includes advice, Trustee Minutes and up to one Loan Agreement	<b>£460+VAT</b>
<b>Incremental Loan Agreement per additional Beneficiary</b>	<b>£170+VAT</b>
<b>Initial Trust Registration (per Trust)</b>	<b>£120+VAT</b>

## Trust Closure

<b>Closure of a pilot Trust</b> Includes a Deed of Appointment to appoint the initial Trust Fund (£10) to a Beneficiary(ies)	<b>£490+VAT</b>
<b>Closure of an actively managed Trust</b> Includes a Trustees Resolution documenting their decision to close the Trust and Deed of Appointment to appoint assets out to Beneficiary(ies)	<b>from £990+VAT</b>

## Absolute Appointment of Capital to Beneficiaries

<b>Deed of Appointment of Capital</b> Trustees make an absolute distribution of Trust capital but the Trust is to remain active	<b>£490+VAT</b>
<b>Deed of Arrangement to appoint the assets of the life interest to a beneficiary absolutely</b> Trustees make an arrangement to appoint the assets out of the life interest to a beneficiary absolutely (when the will has no powers of appointment of capital)	<b>£825+VAT</b>

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