

### WBC Charges for Deputy and Appointeeship

Description	Fee
Charges for all deputyship clients – in line with Court of Protection (CoP) statutory charges	Refer to CoP Practice Direction 19B (attached)
Management of client finances under Appointeeship where savings below £3000	£100 annual fee
Management of client finances under Appointeeship where savings above £3000	In accordance with CoP Practice Direction 19B
<b>Deputy and Appointeeship:</b>	
Estates Winding Up Fee – Level 1  Completing the basic Estate requirements, and assuming that there is a valid will and next of kin/solicitor <ul style="list-style-type: none"> <li>• Notify DWP</li> <li>• Notify Court of Protection</li> <li>• Notify Office of the Public Guardian</li> <li>• Notify other financial institutions</li> <li>• Complete BD8 where necessary</li> <li>• Settle funeral and other bills</li> <li>• Distribute estate to executors (where applicable)</li> </ul>	£220.00
Estates Winding Up Fee – Level 2  Work undertaken would include some or all of the basic requirements above, plus any of the additional work required: <ul style="list-style-type: none"> <li>• Completion of final account report for Court of Protection</li> <li>• Advising or assisting on the completion of Probate applications</li> <li>• Referring the estate to Treasury Solicitors</li> <li>• Liaising with Treasury Solicitors</li> </ul>	£270.00
Estates Winding Up Fee – Level 3  Work undertaken would include some or all of levels 1 and 2, plus the additional work of: <ul style="list-style-type: none"> <li>• Collecting Death Certificate</li> <li>• Registering the death</li> <li>• Arranging the funeral</li> </ul>	£380.00
Additional services for clients with capacity e.g. arranging a will / funeral plan	£50.00 one off fee for each request made

We propose that clients should be charged for all services that the team provides, whether it is dictated by statutory fixed costs set by the Court of Protection for clients for whom WBC act as Deputy, or for clients for whom we act as Corporate Appointee.

The current ASC Services Protection and Management of Customers' Financial Affairs manual has always stated our position in relation to fees. However, the charges (outside of those fixed by the CoP) have not been reviewed for a number of years.

It is felt that it is no longer feasible to continue to provide a free service to clients for whom we act as Appointee. However, it is accepted that some clients will have limited funds hence the proposal of a nominal sum that acknowledges that there is work carried out by the team on behalf of these clients.

We also propose that all fees are mandatory for clients' for whom Appointeeship is held, rather than the current system that requires the client to agree to meet relevant costs. Under Court of Protection rules, any work carried out upon the death of a client does not fall within the remit of the Practice Direction. We propose to restructure the current fee arrangement to better reflect the amount of work involved in winding up deceased estates and the charges have been set depending upon the level of work involved. In deciding this, we have looked at the example set by the Royal Borough of Windsor and Maidenhead.

The final charge noted for additional work carried out at the request of a client for whom WBC act as Appointee, has been revised to better reflect the work involved and make it more cost effective to charge.