

AFTER A DEATH · REDIRECTING AN INHERITANCE

Deed of variation

For someone who has inherited and wants it to go to somebody else instead. Section 01 is all Aaron needs to tell you whether it works and what it costs.



HOW THIS WORKS

- 01 Fill in what you can**
Nothing here has to be complete. Blanks are normal at this stage.
- 02 Send it back**
Email the saved file to aaron@safeharbour.legal. He replies within one working day.
- 03 Aaron checks the route**
What has to be done, what it will cost, and what has to happen first.
- 04 A fee in writing**
Agreed before any work starts, and it does not move unless the work does.

WHAT IT COSTS

Deed of variation	£650 + VAT, so £780
2 TO 4 WEEKS	
Inheritance tax check and will structure	£450 + VAT, so £540
Registering an existing trust with HMRC	£300 + VAT, so £360
2 TO 3 WEEKS	

WHO AARON ACTS FOR

The people giving something up. Everyone whose share is reduced has to agree and sign, so Aaron will say in writing which of you he acts for.

Where the variation creates a trust, or is done for inheritance tax, the inheritance tax check is added, and a new trust then has to be registered. Aaron says which applies before any work starts.

Every figure is plus VAT at 20 per cent, and the figure with VAT is beside it. Fees reviewed 14 September 2026. What the fee covers, what it does not and anything paid to somebody else are set out on the closing page, and the fee for your own matter is confirmed in writing before any work starts.

2 years from the death

Signed within 2 years of the death, the redirection is read back for tax. After that it still works, as a gift by the person giving it up.

SEND IT BACK TO

aaron@safeharbour.legal

01262 310 850

safeharbour.legal

Answer section 01 and send it. That is enough for Aaron to open the file, confirm the fee and book the appointment. A blank is an answer: it tells him what to ask you about.

IF AN ADVISER SENT YOU THIS

No referral fee is paid or received in either direction.

Adviser name

Firm

Email

FCA or firm reference

Aaron Johnson, Solicitor of the Senior Courts of England and Wales, TEP

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01

Start here

NEEDED TO START
ABOUT 5 MIN

If you fill in nothing else, fill in this. It is enough for Aaron to open the file, confirm the fee and book the appointment.

Your full name

Your relationship to the person who died

Phone

Email

Your address, with postcode

How would you like Aaron to reply?

☐ Email

☐ Phone

☐ Post

The death

Their full name

Date of death

DD / MM / YYYY

Where they lived

Was there a will?

☐ Yes

☐ No

Are you one of the people who inherits?

☐ Yes

☐ No

Has this inheritance been redirected once already?

☐ Yes

☐ No

A deed, a disclaimer, or anything else signed since the death.

Have you already received what you want to redirect?

☐ Yes

☐ No

Section 04 asks what has happened to it since.

What did you inherit?

☐ A share of what was left over

☐ A fixed sum of money

☐ A particular thing

☐ Not sure

If you are not sure, leave it. Aaron works it out from the will.

What you inherited, and roughly what it is worth

Who you would like it to go to instead

In your own words, why

One or two sentences. It is the answer that decides how Aaron drafts it.

Anything that would make this easier

Someone else Aaron can contact if he cannot reach you, and their number

Anything that would make it easier to deal with Aaron

Hearing, sight, reading, a language, a time of day, or someone you would like with you.

That is section 01 finished

Your name

Signature

Date

DD / MM / YYYY

Send it now to aaron@safeharbour.legal if that is as far as you have got today. It is a complete thing to send. The rest of the form is what Aaron goes through with you, and you can send it later or bring it with you.

02

Who has to agree

NEEDED TO START
ABOUT 4 MIN

Anyone whose share is reduced has to agree and sign. This is the part that usually decides whether it can be done at all.

Everyone whose share is reduced has to agree and sign, so Aaron needs to be able to reach each of them. The last column is why: any one of those changes what can be done.

EVERYONE GIVING SOMETHING UP	RELATIONSHIP	EMAIL OR PHONE	WHAT THEY ARE GIVING UP	AGREED?	UNDER 18, BANKRUPT OR ON BENEFITS?
EG Margaret Hartley	widow	07700 900321	half the residue	yes	no

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

Is anything being given or promised in return?

☐ Yes ☐ No

Money, a transfer, or an arrangement of any kind. Aaron has to ask.

Would you like Aaron to act for everyone giving something up?

☐ Yes ☐ No

If someone would rather take their own advice, say so below.

Anything about the people above

03

Who benefits instead

The people receiving what is redirected.

ONLY IF IT APPLIES
ABOUT 3 MIN

A charity has no date of birth, so put its registered number in that column instead.

FULL NAME	DATE OF BIRTH, OR CHARITY NUMBER	RELATIONSHIP TO THE PERSON WHO DIED	WHAT THEY RECEIVE
EG Tom Ellis	03 / 09 / 2011	great-grandson	a sixth

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

Should anything go into a trust rather than to a person outright?

☐ Yes ☐ No

For example for grandchildren who are young.

Is anything going to a charity?

☐ Yes ☐ No

Is any of it land or a building?

☐ Yes ☐ No

If it is going into a trust

Only if you ticked the first box above.

WHO YOU WANT AS TRUSTEES	RELATIONSHIP TO YOU	EMAIL OR PHONE

Who should be able to benefit

Names, or a description such as all my grandchildren

At what age should they get it outright?

A number, if you have one in mind.

04

The estate, and where it has got to

What Aaron needs from the executors. If you are not one of them, leave what you do not know.

ONLY IF IT APPLIES
ABOUT 4 MIN

Not an executor? Answer what you can and leave the rest to Aaron.

Their solicitor, if they have one, goes in the last column too.

THE EXECUTORS, BY NAME	EMAIL OR PHONE	ARE THEY ALSO GIVING SOMETHING UP?
EG David Hartley	07700 900456	no

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

	YES	NO	NOT KNOWN
May Aaron contact the executors or their solicitor about this? It saves Aaron writing to you for figures the executors hold.	☐ Yes	☐ No	☐ Not known
Has the grant of probate been issued?	☐ Yes	☐ No	☐ Not known
Was inheritance tax paid on the estate?	☐ Yes	☐ No	☐ Not known
Has any of what you inherited been spent, sold, or paid into an account with your own money?	☐ Yes	☐ No	☐ Not known
Did they leave a husband, wife or civil partner who is still alive? Aaron asks whether or not there was a will.	☐ Yes	☐ No	☐ Not known

Roughly what was the estate worth?

Date of the will

DD / MM / YYYY

Date of the grant, if it has been issued

DD / MM / YYYY

Anything else Aaron should know

Including anything in the family that would make this difficult, and anything above you could not answer.

05

Before you send it

What happens to your answers, what to bring, and where to sign.

NEEDED TO START
ABOUT 2 MIN

What Aaron will need to see, at or before the appointment

- ☐ The will, and any codicils
- ☐ The grant of probate, if it has been issued
- ☐ Photo ID and proof of address for everyone signing
- ☐ The estate accounts, or a schedule of what the estate held
- ☐ Anything showing what inheritance tax was paid
- ☐ The title number or deeds, if land is being redirected

Tick what you already have. Nothing has to be sent with this form, and nothing missing here delays the work.

What the fee covers

Taken from the schedule on page one. The fee for your own matter is confirmed in writing before any work starts.

WHAT THE FEE COVERS

Redirecting part or all of an inheritance to someone else by deed, with the tax elections where the death was within two years.

NOT INCLUDED

Where the variation creates a trust or is done for inheritance tax, the inheritance tax check is added.

PAID TO SOMEBODY ELSE

HMRC Trust Registration Service, no charge (No HMRC fee to register a trust).

ONBOARDING AND IDENTITY CHECKS

£20 plus VAT, once, for the matter, and an identity check of £6.25 plus VAT for each person signing. Both are confirmed in writing before any work starts.

Two things to agree

- ☐ Tell the adviser named on page one when the matter opens, with the agreed fee, and again when it is signed.
- ☐ Ordinary email is fine for documents about my matter, and I have read the warning about money below.

Where the originals go

Where you would like the signed originals kept

With Aaron, with you, or somewhere else.

Who else should know where they are

A name and a phone number is enough.

Did anyone help you fill this in, and which parts?

Their name and how they are related to you. Write none if you did it yourself.

Signed

Type your name, or print this page and sign it by hand.

One line for each person named in the schedule above.

FULL NAME	SIGNATURE	DATE

Your information

MDLS Solicitors Limited is the controller for the information on this form. It is used to advise you and to carry out your instructions, and is kept as long as the file and the professional record require. It is not sold, and it is not shared outside the firm without your consent except where the law requires it. The data protection officer is Matthew Dowell, md@legalstudio.co.uk. The firm is registered with the Information Commissioner under ZA057790, and you can complain to the Commissioner at ico.org.uk.

If something goes wrong

If something goes wrong, say so. Tell Aaron first, on 01262 310 850 or at aaron@safeharbour.legal. If that does not settle it, write to Ian McCann, Solicitor and Chief Executive, at ijm@legalstudio.co.uk or on 0113 247 3800. You will have an acknowledgement within five working days and an answer within eight weeks. After that, or if eight weeks pass, you can take the complaint to the Legal Ombudsman at enquiries@legalombudsman.org.uk, on 0300 555 0333, or at PO Box 6167, Slough, SL1 0EH, within six months of the firm's final answer and within one year of the problem. The Solicitors Regulation Authority deals separately with conduct, at sra.org.uk.

Money

Safe Harbour's bank details do not change during a matter, and Aaron will never email to say they have. If you get any message asking you to send money somewhere new, telephone 01262 310 850 before you send anything.



C

More room, if you need it

ONLY IF IT APPLIES

Spare ruled lines for anything that did not fit in a list earlier in the form. Most people never use this page.

Your name

Date

DD / MM / YYYY

Write the section number and the name of the list on the left, then the answer on the right, in the same order as the columns on that list. One line for each thing.

SECTION AND LIST	YOUR ANSWER, IN THE SAME ORDER AS THAT LIST'S COLUMNS
EG 05 Pensions	Aviva, old works pension, about 12,000, my wife

If you have printed the form, print this page again for as many lines as you need. If you are typing and you run out of lines, put the rest in the body of the email. Nothing is lost that way.

A

At the meeting

FOR THE FIRM

Completed by Aaron, not by the client.

Instructions and what was said, in the client's own words, with their reasons

The note that answers, years later, what was said and what was understood.

Date	From and to	Where	Everyone present

DD / MM / YYYY

Office, home, telephone, video

Client seen on their own for part of the meeting	☐ Yes	☐ No
Instructions given by the client, not through anyone who benefits	☐ Yes	☐ No
Identity verified, evidence on the file	☐ Yes	☐ No
Conflict check run and clear	☐ Yes	☐ No
Source of funds and of wealth understood and recorded where relevant	☐ Yes	☐ No
Client care letter and terms of business sent	☐ Yes	☐ No

ID: what was seen. Type and expiry only, no numbers on this sheet	How checked	File reference

Original, certified copy, electronic

Understood, in their own words. What was observed, not a conclusion

☐ What they were making, and its effect	☐ What they owned, broadly
☐ Who might expect to benefit	☐ No disorder affecting the decision
☐ Medical opinion sought	☐ Not needed, reason in the note above

Scope	Fee agreed, plus VAT	Matter reference	Signed and dated

WHAT HAPPENS NEXT	WHO	BY WHEN

B

For the adviser who sent this

NOT PART OF THE FORM

For the financial adviser, accountant or broker who passed this on. Nothing on this page is part of the form.

What happens to a referral

Aaron reads the form before he meets the client, confirms the fee in writing, and does the work. No referral fee is paid or received in either direction, and the client is charged the same as anyone else. If the client has ticked the box on page one, you are told twice: when the matter opens, with the agreed fee and the expected date, and again when the documents are signed. Nothing else is sent to you, and your own details are used for those two messages and nothing else. They are not added to any list and are not passed on.

What Safe Harbour does not do

- 01 No investment advice, no products, no commission, and no financial promotions.
- 02 No approach to your client about anything you have not asked for.
- 03 No fee for the referral, in either direction.
- 04 Nothing signed without Aaron speaking to the client, on their own for part of it.

Data protection, when you forward a form

If your client returns the form themselves, MDLS Solicitors Limited is the controller from the moment it arrives and you never hold their answers. If you forward a completed form, you are processing your own client's information under your own registration and Aaron becomes a separate controller when he receives it. The cleaner route is to send the blank form and let the client return it.

Getting hold of Aaron

Aaron Johnson, Solicitor of the Senior Courts of England and Wales, TEP. Telephone 01262 310 850, or aaron@safeharbour.legal. Regulated through Legal Studio, with the professional indemnity insurance and the complaints route that brings; the complaints route is printed in full on the client's own closing page. Check the register at sra.org.uk under SRA ID 598793.



Scarborough Castle

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