



04 July 2019

LEGACY NOTIFICATION SERVICE

I want to set out the arrangements we are putting in place to enable charities to continue to receive legacy notification services once the contractual arrangements with Smee & Ford cease at the end of July.

As you know, we have been working hard to establish an interim solution that meets both our legal obligations, including charging the statutory fee for the provision of wills, and the immediate needs of participating charities for whom the service is an important tool supporting essential work.

We have been assisted in this work by the contribution and insight of representatives of the charity sector that sit on the HMCTS steering group we established earlier this year and also by Smee & Ford.

Ensuring continuity of service to charities has been our key goal and I am pleased to say that this has been made possible by the decision of the Lord Chancellor to amend a number of fees, including significantly reducing probate copy fees. These changes – contained in a Statutory Instrument laid before Parliament this week – are due to come into force on 22 July 2019.

However, while the cost to anyone applying for a copy of an individual will or grant will reduce as a result of this change in fees, Smee & Ford's operating costs will increase from August as they will be obliged to pay the statutory fee for all wills and grants. We understand that participating charities will be asked to pay more for each notification received but that the service will be enhanced by the inclusion of a copy of the relevant will itself.

Smee & Ford have informed us they will be communicating today with existing customers regarding fees, provision of will copies and the implementation timescales for this change.

We have shared this information with charity sector representatives who welcome the continuity of service this solution provides to member charities. They also agree that provision of the will at the same time as the standard notification will enhance the information available to charities and reduce administrative burdens related to applying for copies of wills from HMCTS, or seeking them from executors.

We anticipate that this new arrangement will operate for at least the next 12 months, during which time we will continue to work with the charity sector and others to design longer-term arrangements to support legacy notification. As part of this work, and alongside policy

colleagues in the Ministry of Justice, we are hosting a workshop with charity representatives from the steering group on this issue later this month.

HMCTS is acutely conscious of both the importance of legacy income in supporting charitable work and the value of an effective notification service to charities themselves. I hope the solution I have outlined gives reassurance to the sector that the existing services will continue uninterrupted and that we can work together to help ensure a longer-term solution that works for all.

Yours sincerely

A handwritten signature in black ink, appearing to read 'S. Acland-Hood', written in a cursive style.

Susan Acland-Hood

Chief Executive, HM Courts & Tribunals Service