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Our Ref: CL/3885
Your Ref: BD/36697Wills

05 February 2024

Sent by email only to bill.dhariwal@lawcomm.co.uk

Dear Sirs

Bernadette Rogers v Andrew Wills
Claim No.: PT-2023-000426
In the High Court of Justice

We refer to your correspondence of the 15 November 2023.

Your proposal of supplying the requested documents, namely interim estate accounts and supporting documentation, is needlessly complex. Our client does not require physical copies, and we suggest that the documents are emailed across to ourselves which should not incur any additional charges.

Turning to the documentation our client is entitled to view, our client is specifically asking to be provided with the following;

1. A detailed list of the deceased person's assets, the total value of the estate, including; money received, bank accounts, investments, personal property, and any outstanding debts.
2. The estimated timeline for the probate process and when distributions to beneficiaries are expected. Confirmation of whether any distributions have already been made. Information on how distributions will be made, and how often the beneficiaries will be kept up to date with the probate process generally.
3. An itemised list of all estate expenses, including legal fees and administrative costs.
4. Details of any compensation the executor is receiving, and if so, how this has been calculated.
5. Details of any inheritance tax due on the estate, and how this will be handled.
6. Copies of any legal documents filed with the court relating to the probate process.
7. If available, the final estate accounts.

Please confirm that the documents will be shared with us imminently and in any event, no later than 14 days from the date of this letter.

Finally, we are sure that you are aware that executors have an obligation to act with impartiality and to prevent conflicts of interest when administering an estate. Our client has concerns about your client's ability to execute their duties fairly and impartially towards her, and if this is not possible, given

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the current dispute between them and the previous criminal case, then there is arguably a conflict of interest.

Therefore, in the interests of the fair and independent management of the estate, we urge your client to consider his position as executor and whether he is able to fulfil this duty effectively. If your client is unable to meet their fiduciary duties then the parties will need to consider his removal and appoint an independent person to fulfil this role, to ensure that the estate is administered fairly, which is in all the beneficiaries interests.

Yours sincerely

Kleyman & Co Solicitors

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