

What is STEP and why use a STEP qualified solicitor?

The Society of Trust and Estate Practitioners (STEP) is the leading body in the multi-disciplinary field of Trust and Estate work. Fully accredited STEP practitioners can use the designation TEP (Trust and Estate Practitioner) which shows that they have met the standards set by the professional body. In most cases this means that the practitioner has passed the STEP Diploma which involves rigorous examination in the administration of estates, administration of trusts, taxation of trusts and estates and estate accounts.

We find that professional advisors who refer work to us require lawyers who are STEP qualified as the qualification is an assurance to them that we know what we are doing. At Harvey Associates we have two fully accredited STEP members and the other members of our firm are in the process of completing the STEP Diploma.

Where do you normally meet clients?

The usual place we meet clients is in our offices in Central London. We do also see clients at more convenient locations which can mean their places of work or at their home. Generally speaking we will be happy to go to a client's place of work if it is in central London and for home visits we can cover inside the M25 and also further afield within the home counties too. However on a few occasions we have been further afield and we have also held calls with clients overseas via Skype.

How much do you charge?

Please find our costs information here [hyperlink to fees] and by all means feel free to call us to discuss further.

Do you have any will instruction questionnaires that I can be getting on with?

Yes we do, however we would ask that you email us [hyperlink to email: info@harveyassociates.co.uk] so that we can send it to you.

Do you provide a secure storage facility for deeds and documents?

Yes we have a secure external storage facility for client documents. At present we provide this as a complimentary service at our discretion.

Are you familiar with dealing with very elderly people?

Yes we have lots of experience dealing with very elderly people and we believe that we are sensitive to their particular requirements.

I would like you to advise my parents on making new wills and Lasting Powers of Attorney, how do we proceed?

We can only accept instructions directly from your parents, so if they would like to instruct us, please ask them to write in, telephone or email. You are welcome to call us to discuss further.

Do members of your firm act as attorneys, trustees, and executors?

Yes we do although we never insist. Our Practice Director Graham Harvey BA TEP Solicitor is appointed as an executor, trustee and attorney for many of our clients.