

**IN THE COURT OF PROTECTION
MENTAL CAPACITY ACT 2005**

OPG Case No.

SCCO Reference:
(Complete if known)

**IN THE MATTER OF
John Smith
(A Protected Party)**

Detailed Bill of costs of the Deputy in respect of General management of the Protected Party's affairs for the period 03/03/2020 to 02/03/2021 to be assessed on the standard basis pursuant to the First General Order dated 03/03/2020 and the General Direction dated 19/11/1982

Solicitor's Name

Address

Solicitor's Reference

Email

(for return of assessed bill)

VAT No.

Background Information

Assessor's Comments:

OPG105 overall figure of estimated costs for this period (if general management):
£9,000.00

Non Welfare Cases - Value and breakdown of P's assets (if known)
In the interests of proportionality, the approximate value of the Protected Party's estate is £70,000.00. These funds are held within the Deputyship bank account and a direct saver with NS&I.
By way of income, the Protected Party is in receipt of state pension payments.

By way of background, the Protected Party is a permanent resident of a Care Home, having been first admitted as a resident in May 2019. He was previously diagnosed with paranoid schizophrenia at 18, and later vascular dementia in February 2018. His placement at the home is funded through S117 funding from the Local Authority.

In April 2020, the fee earner completed the relevant forms to make an application for a new Deputyship account to be opened with Arbuthnot Latham. Furthermore, it was necessary to register the Order with key parties, including banks and pension providers.

In May 2020, the fee earner was engaged in applying for a fee remission in respect of the annual supervision fee payable to the OPG. This necessitated the completion of the OPG120 form.

On 23 June 2020, the Deputy attended upon the Protected Party at the care home, providing the COP14, and explaining the Court Order and the role that the Deputy would play in managing his property and finances. The Protected Party confirmed that he did not have any questions, and they discussed the clearance of his flat. The Protected Party advised that he would like to keep his TV, and a number of personal photographs.

During the period, steps were taken to terminate the tenancy in place with the Housing Trust in respect of the rental property, where the Protected Party had previously resided. Issues were experienced in respect of the account held with United Utilities at the property, as conflicting correspondences were received advising that there were arrears owing, however that also a refund was owed to the Protected Party. Whilst the tenancy was still in place, the fee earner ensured that the required unoccupied insurance was in place, and in addition that regular visits were undertaken at the property to comply with the terms of the policy, and to ensure that the property remained safe and secure. It was also vital to arrange for the items contained in the property to be cleared.

In October 2020, contact was made with a number of local Solicitors firms, in order to ascertain whether they had previously prepared and held a will for the Protected Party.

This matter was dealt with by Grade D fee earners in the main, with assistance from other fee earners where necessary.

The Costs Officer is invited to note that following the hourly rates case which was released on the 30 September 2020, we have applied the recommended 20% uplift to the 2010 Guideline Hourly Rates in accordance with Master Whalan's decision. The Grade A Deputy worked out of the central Manchester office during the management period, and therefore has been claimed at the appropriate hourly rate for that area (National 1)'.

CHRONOLOGY (where required)

Date

Details

Fee Earners & Rates

Assessor's Comments:

FE	FE Name	FE Status	FE Grade	Further Relevant Information	FE Rate Claimed	FE Rate Allowed	FE Rate Effective From	Assessor's Comments
GHI	Georgia Ison	Partner	A	Working from Manchester Office	217.00	217.00	03/03/2020 to 29/09/2020	
GHI2	Georgia Ison	Partner	A	Working from Manchester Office	260.00	260.00	30/09/2020 to 02/03/2021	
ABC	Ajay Chaudry	Assistant Solicitor	B		177.00	177.00	03/03/2020 to 29/09/2020	
ABC2	Ajay Chaudry	Assistant Solicitor	B		212.00	212.00	30/09/2020 to 02/03/2021	
DEF	Danielle Fisher	Legal Executive	C		146.00	146.00	03/03/2020 to 29/09/2020	
DEF2	Danielle Fisher	Legal Executive	C		175.00	175.00	30/09/2020 to 02/03/2021	
JKL	Josephine Littlewood	Paralegal	D		111.00	111.00	03/03/2020 to 29/09/2020	
JKL2	Josephine Littlewood	Paralegal	D		133.00	133.00	30/09/2020 to 02/03/2021	
IVP	Insurance Visit Paralegal	Insurance Visit Paralegal (Half Grade D Rate)	D		55.50	55.50	03/03/2020 to 29/09/2020	
IVP2	Insurance Visit Paralegal	Insurance Visit Paralegal (Half Grade D Rate)	D		66.50	66.50	30/09/2020 to 02/03/2021	
Z1		Blended Rate	Z1					
Z2		Payroll Rate	Z2					
Z3		Non-Fee Earner Rate	Z3					

Parts

Part ID	Description	VAT Rate
Part 1	Deputyship Administration - to 29/09/2020	20.00%
Part 2	Deputyship Administration - from 30/9/2020	20.00%

Bill Detail (print)

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
1	05/04/2020	Engaged in a lengthy call with the Protected Party.	Protected Party		ABC	ABC	177.00	177.00	0.50	0.50	88.50	88.50		
2	24/04/2020	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the current financial position.			JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
3	30/04/2020	Preparing long letter to Arbuthnot Latham opening new Deputyship account.	Arbuthnot Latham		JKL	JKL	111.00	111.00	0.30	0.30	33.30	33.30		
4	30/04/2020	Drafting the COP14 to serve notice of the application upon the Protected Party			DEF	DEF	146.00	146.00	0.20	0.20	29.20	29.20		
5	30/04/2020	Conducting a review of the Protected Party's matter and ascertaining the actions required to progress the same.			ABC	ABC	177.00	177.00	0.20	0.20	35.40	35.40		
6	30/04/2020	Considering the Order received from the Court, and noting the authorities granted to the Deputy under the same.			ABC	ABC	177.00	177.00	0.20	0.20	35.40	35.40		
7	30/04/2020	Completing the Court of Protection account forms for submission to Arbuthnot Latham.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
8	30/04/2020	Drafting the Deputyship account request forms for submission to Arbuthnot Latham.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
9	04/05/2020	Reviewing the rental account statement, and ascertaining that the payments were up to date. Noting the next steps in advising Housing Benefit that the Protected Party was now in care.			ABC	ABC	177.00	177.00	0.20	0.20	35.40	35.40		
10	05/05/2020	Perusing the care home invoice received, and thereafter making a payment in settlement of the same.	Care Home		JKL	JKL	111.00	111.00	0.05	0.05	5.55	5.55		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
11	07/05/2020	Considering non-routine correspondence from Pension Credit, and noting the key information as to the Protected Party 's entitlement.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
12	12/05/2020	Reviewing non-routine correspondence from the Council, and noting the position as to the housing benefit and council tax support being received by the Protected Party .			ABC	ABC	177.00	177.00	0.10	0.10	17.70	17.70		
13	12/05/2020	Perusing non-routine correspondence from the OPG, and noting that the annual supervision fee was due.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
14	12/05/2020	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the current financial position.			JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
15	12/05/2020	Engaged in completing the OPG120 form to apply for a fee exemption in respect of the annual supervision fee.			JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
16	13/05/2020	Considering non-routine correspondence from Halifax, and amending the financial schedule accordingly.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
17	18/05/2020	Perusing non-routine correspondence from Halifax, and noting the next steps required in completing the account access forms. Also extracting the key details as to the accounts held by the Protected Party .			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
18	21/05/2020	Completing the Halifax access forms to register the Deputyship over the Protected Party 's accounts.			ABC	ABC	177.00	177.00	0.10	0.10	17.70	17.70		
19	26/05/2020	Reviewing and certifying the Halifax forms as Deputy.			GHI	GHI	217.00	217.00	0.10	0.10	21.70	21.70		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
20	06/06/2020	Speaking with the Protected Party regarding his care needs and placement at the home.	Protected Party		DEF	DEF	146.00	146.00	0.70	0.70	102.20	102.20		
21	08/06/2020	Considering the position as to the annual supervision fee which remained outstanding, and ascertaining the course of action to be taken as Deputy			GHI	GHI	217.00	217.00	0.10	0.10	21.70	21.70		
22	09/06/2020	Perusing non-routine correspondence from Pension Credit, and noting the key details as to the Protected Party's entitlement.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
23	09/06/2020	Reviewing various items of correspondence from the Council, and extracting the information required to progress matters.			JKL	JKL	111.00	111.00	0.30	0.30	33.30	33.30		
24	11/06/2020	Considering non-routine correspondence from the bank, and noting the salient points regarding the account held.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
25	11/06/2020	Reviewing non-routine correspondence from the Council, and noting the key details required to progress matters.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
26	15/06/2020	Perusing non-routine correspondence from the bank, and extracting the key information regarding the Protected Party's accounts.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
27	15/06/2020	Considering non-routine correspondence from the Council, and noting the salient points.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
28	16/06/2020	Reviewing non-routine correspondence from the bank, and noting the key details as to the accounts held.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
29	23/06/2020	Attending upon the Protected Party at the care home, providing the COP14, and explaining the Court Order and the role that the Deputy would play in managing his property and finances. The Protected Party confirmed that he did not have any questions, and they discussed the clearance of his flat. The Protected Party advised that he would like to keep his TV, and a number of personal photographs.	Protected Party		GHI	GHI	217.00	217.00	0.50	0.50	108.50	108.50		
30	23/06/2020	Meeting with the care worker at the care home, who confirmed that the Protected Party was a permanent resident, and that he was subject to a DOLS. Being advised that the Protected Party did not have any visitors, and that his fees were being paid by the Council.	Care Home		GHI	GHI	217.00	217.00	0.30	0.30	65.10	65.10		
31	23/06/2020	Travel to and from the attendance at the care home.	Care Home		GHI	GHI	217.00	217.00	0.60	0.60	130.20	130.20		
32	23/06/2020	Paid travel expenses (15 miles at 45 pence per mile)	Care Home										6.75	6.75
33	23/06/2020	Speaking with the care home, in order to arrange an attendance upon the Protected Party. Noting the need to wear PPE, and that visiting time was very limited.	Care Home		GHI	GHI	217.00	217.00	0.20	0.20	43.40	43.40		
34	24/06/2020	Perusing non-routine correspondence from Halifax, and noting the PIN number provided.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
35	26/06/2020	Undertaking a detailed review of the Protected Party 's affairs, including his residence at the care home, the DOLS in place, and the ongoing tenancy. Ascertain the next steps in clearing out the property and cancelling the tenancy in place.			JKL	JKL	111.00	111.00	0.80	0.80	88.80	88.80		
36	06/07/2020	Considering non-routine correspondence from Halifax, and noting the planned decrease in the interest rate on the Protected Party 's savings account.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
37	06/07/2020	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the current financial position,			JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
38	07/07/2020	Considering and certifying the Arbuthnot Latham forms as Deputy.			GHI	GHI	217.00	217.00	0.30	0.30	65.10	65.10		
39	07/07/2020	Reviewing the position as to the tenancy in place, and noting the need to arrange for the locks to be changed at the property.			ABC	ABC	177.00	177.00	0.10	0.10	17.70	17.70		
40	07/07/2020	Engaged in finalising the Arbuthnot Latham account opening forms.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
41	09/07/2020	Perusing non-routine correspondence from the Housing Trust, and ascertaining the next steps in respect of termination of the tenancy.			ABC	ABC	177.00	177.00	0.10	0.10	17.70	17.70		
42	13/07/2020	Considering the care home invoice received, and thereafter arranging payment in settlement of the same.	Care Home		JKL	JKL	111.00	111.00	0.05	0.05	5.55	5.55		
43	20/07/2020	Reviewing the response received from the OPG, and noting the further information required to progress the fee exemption application.			GHI	GHI	217.00	217.00	0.10	0.10	21.70	21.70		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
44	22/07/2020	Attending at the rental property, which was secure. Also noting the key safe fitted to the exterior of the building, and noting the need to consult the housing trust as to entry.	Protected Party's Rental Property		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
45	22/07/2020	Travel to and from the Protected Party 's rental property.	Protected Party's Rental Property		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
46	22/07/2020	Perusing non-routine correspondence from the DWP as to the Protected Party 's pension credit, and noting the information required to progress matters.			ABC	ABC	177.00	177.00	0.10	0.10	17.70	17.70		
47	23/07/2020	Considering the correspondence received from the OPG as to the fee remission/exemption application, and thereafter collating the further evidence as to the Protected Party 's benefits and pension credit.			JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
48	24/07/2020	Preparing a further copy of the OPG120 with additional evidence as requested by the OPG.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
49	08/08/2020	Receiving a call from the Protected Party who requested additional funds.	Protected Party		ABC	ABC	177.00	177.00	0.40	0.40	70.80	70.80		
50	10/08/2020	Attending at the property to ensure that the same was safe and secure, and that the water system was off and drained. Also collecting a significant amount of mail which had built up.	Protected Party's Rental Property		JKL	JKL	111.00	111.00	0.60	0.60	66.60	66.60		
51	10/08/2020	Travel to and from the attendance at the rental property.	Protected Party's Rental Property		IVP	IVP	55.50	55.50	0.40	0.40	22.20	22.20		
52	19/08/2020	Reviewing non-routine correspondence from NS&I, and noting the current level of funds held in the investment account.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
53	20/08/2020	Ascertaining the course of action to be taken in respect of attendances at the rental property and the position as to the stop tap.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
54	24/08/2020	Preparing a file note to evidence the attendance upon the property on 10 August 2020			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
55	26/08/2020	It was necessary to visit the property to ensure that the building was secure as per the terms of the unoccupied property insurance in place. Also collating any items of post and documentation relating to the Protected Party 's property and financial affairs.	Protected Party's Rental Property		JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
56	26/08/2020	Travel to and from the attendance at the rental property.	Protected Party's Rental Property		IVP	IVP	55.50	55.50	0.40	0.40	22.20	22.20		
57	27/08/2020	Drafting an attendance note to evidence the visit to the property on 26 August 2020.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
58	02/09/2020	Reviewing the care home invoice received, and making a payment in settlement of the same.	Care Home		JKL	JKL	111.00	111.00	0.05	0.05	5.55	5.55		
59	02/09/2020	Considering non-routine correspondence from Eon, and noting the electricity charges incurred.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
60	02/09/2020	Perusing non-routine correspondence from United Utilities, and noting the overdue payment.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
61	02/09/2020	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the current financial position.			JKL	JKL	111.00	111.00	0.30	0.30	33.30	33.30		
62	07/09/2020	Considering the progress made in respect of the clearing of the property and terminating of the tenancy, and creating an agenda of the next steps.			ABC	ABC	177.00	177.00	0.10	0.10	17.70	17.70		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
63	09/09/2020	It was necessary to visit the property to ensure that the building was secure as per the terms of the unoccupied property insurance in place. Also collating any items of post and documentation relating to the Protected Party 's property and financial affairs.	Protected Party's Rental Property		JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
64	09/09/2020	Travel to and from the attendance at the rental property.	Protected Party's Rental Property		IVP	IVP	55.50	55.50	0.40	0.40	22.20	22.20		
65	09/09/2020	Preparing a file note to evidence the recent attendance on the property on 9 September 2020.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
66	10/09/2020	Undertaking a detailed review of the 79 items of post collected from the Protected Party 's property, in order to identify details of any assets, sources of income, items of expenditure or debts held by the Protected Party that had not yet been identified.			JKL	JKL	111.00	111.00	3.00	3.00	333.00	333.00		
67	11/09/2020	Perusing non-routine correspondence from Halifax, and noting the current funds held in the Protected Party 's two accounts.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
68	11/09/2020	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the financial position following the thorough review of the items of post collated from the property.			JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
69	14/09/2020	Engaged in a further lengthy call with the Protected Party regarding the Protected Party's finances and the steps being taken to terminate the tenancy still in place.	Protected Party		ABC	ABC	177.00	177.00	0.90	0.90	159.30	159.30		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
70	14/09/2020	Considering non-routine correspondence from Halifax, and noting that there had been no transactions on the Protected Party 's accounts for the period queried,			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
71	14/09/2020	Perusing further correspondence from Halifax, and reviewing the transactions, interest accrued and balance of funds on the account ending 8094.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
72	14/09/2020	Reviewing an additional item of correspondence from Halifax, and reviewing the transactions, interest accrued and current balance of the account ending 9425.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
73	24/09/2020	Considering the care fee invoice received, noting the charges incurred, and making a payment in settlement of the same.	Care Home		JKL	JKL	111.00	111.00	0.05	0.05	5.55	5.55		
74	24/09/2020	It was necessary to visit the property to ensure that the building was secure as per the terms of the unoccupied property insurance in place. Also collating any items of post and documentation relating to the Protected Party 's property and financial affairs. In addition, taking photographs to prepare an inventory of the contents.	Protected Party's Rental Property		JKL	JKL	111.00	111.00	0.40	0.40	44.40	44.40		
75	24/09/2020	Travel to and from the attendance at the rental property.	Protected Party's Rental Property		IVP	IVP	55.50	55.50	0.40	0.40	22.20	22.20		
76	24/09/2020	Reviewing the position as to the rental property, and noting the next steps in drafting an inventory of the contents.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
77	24/09/2020	Perusing non-routine correspondence from United Utilities, noting that the Deputy had been registered against the account, and noting that the account was in credit.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
78	24/09/2020	Drafting a file note to evidence the recent visit upon the property on 24 September 2020			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
79	29/09/2020	Considering non-routine correspondence from RSA, and noting that there was no policy in place.			JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
80	(blank)	7 Telephone Calls	Protected Party		GHI	GHI	217.00	217.00	0.70	0.70	151.90	151.90		
81	(blank)	10 Telephone Calls	Protected Party		ABC	ABC	177.00	177.00	1.00	1.00	177.00	177.00		
82	(blank)	11 Telephone Calls	Protected Party		DEF	DEF	146.00	146.00	1.10	1.10	160.60	160.60		
83	(blank)	20 Telephone Calls	Protected Party		JKL	JKL	111.00	111.00	2.00	2.00	222.00	222.00		
84	(blank)	5 Letters	Protected Party		GHI	GHI	217.00	217.00	0.50	0.50	108.50	108.50		
85	(blank)	8 Letters	Protected Party		ABC	ABC	177.00	177.00	0.80	0.80	141.60	141.60		
86	(blank)	10 Letters	Protected Party		DEF	DEF	146.00	146.00	1.00	1.00	146.00	146.00		
87	(blank)	16 Letters	Protected Party		JKL	JKL	111.00	111.00	1.60	1.60	177.60	177.60		
88	(blank)	2 Telephone Calls	Housing Trust		JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
89	(blank)	15 Letters	Housing Trust		JKL	JKL	111.00	111.00	1.50	1.50	166.50	166.50		
90	(blank)	1 Letter	Housing Trust		ABC	ABC	177.00	177.00	0.10	0.10	17.70	17.70		
91	(blank)	2 Letters	Arbuthnot Latham		JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
92	(blank)	6 Letters	Halifax		JKL	JKL	111.00	111.00	0.60	0.60	66.60	66.60		
93	(blank)	1 Letter	Halifax		ABC	ABC	177.00	177.00	0.10	0.10	17.70	17.70		
94	(blank)	2 Letters	NS&I		JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
95	(blank)	4 Letters	Pension Credit		JKL	JKL	111.00	111.00	0.40	0.40	44.40	44.40		
96	(blank)	2 Letters	Pension Service		JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
97	(blank)	1 Letter	Deputy		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
98	(blank)	1 Letter	Deputy		DEF	DEF	146.00	146.00	0.10	0.10	14.60	14.60		
99	(blank)	3 Letters	OPG		JKL	JKL	111.00	111.00	0.30	0.30	33.30	33.30		
100	(blank)	3 Telephone Calls	Care Home		JKL	JKL	111.00	111.00	0.30	0.30	33.30	33.30		
101	(blank)	2 Letters	Care Home		JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
102	(blank)	1 Telephone Call	Community Mental Health Team		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
103	(blank)	5 Letters	DWP		JKL	JKL	111.00	111.00	0.50	0.50	55.50	55.50		
104	(blank)	1 Letter	TV Licensing		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
105	(blank)	1 Telephone Call	Eon		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
106	(blank)	3 Letters	Eon		JKL	JKL	111.00	111.00	0.30	0.30	33.30	33.30		
107	(blank)	4 Telephone Calls	United Utilities		JKL	JKL	111.00	111.00	0.40	0.40	44.40	44.40		
108	(blank)	5 Letters	United Utilities		JKL	JKL	111.00	111.00	0.50	0.50	55.50	55.50		
109	(blank)	3 Letters	British Gas		JKL	JKL	111.00	111.00	0.30	0.30	33.30	33.30		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
110	(blank)	1 Letter	Yorkshire Building Society		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
111	(blank)	4 Letters	Protected Party's Mother		JKL	JKL	111.00	111.00	0.40	0.40	44.40	44.40		
112	(blank)	5 Enclosure Letters	Protected Party's Mother		JKL	JKL	111.00	111.00	0.25	0.25	27.75	27.75		
113	(blank)	1 Letter	RSA		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
114	(blank)	1 Letter	Yorkshire Bank		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
115	(blank)	2 Telephone Calls	Case Manager		JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
116	(blank)	5 Enclosure Letters	Case Manager		JKL	JKL	111.00	111.00	0.25	0.25	27.75	27.75		
117	(blank)	2 Telephone Calls	Court		JKL	JKL	111.00	111.00	0.20	0.20	22.20	22.20		
118	(blank)	1 Telephone Call	Counsel		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
119	(blank)	2 Enclosure Letters	Property Team		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
120	(blank)	4 Telephone Calls	High Street Solicitors		JKL	JKL	111.00	111.00	0.40	0.40	44.40	44.40		
121	(blank)	3 Letters	High Street Solicitors		JKL	JKL	111.00	111.00	0.30	0.30	33.30	33.30		
122	(blank)	1 Letter	Clearance Agent		JKL	JKL	111.00	111.00	0.10	0.10	11.10	11.10		
123	02/10/2020	Reviewing the transactions on the Deputyship account, and extracting the key details to prepare an account spreadsheet.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
124	05/10/2020	Perusing non-routine correspondence from Eon, and noting the planned changes to the energy prices.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
125	05/10/2020	Reviewing further correspondence from Eon, and noting the outstanding electricity balance.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
126	05/10/2020	Considering non-routine correspondence from United Utilities, and noting the details of the monies owing.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
127	05/10/2020	Perusing further correspondence from United Utilities, and noting the credit balance and the fact that a refund was owed.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
128	05/10/2020	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the current financial position.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
129	07/10/2020	It was necessary to visit the property to ensure that the building was secure as per the terms of the unoccupied property insurance in place. Also collating any items of post and documentation relating to the Protected Party 's property and financial affairs. Thereafter reviewing the chattels at the property.	Protected Party's Rental Property		JKL2	JKL2	133.00	133.00	0.30	0.30	39.90	39.90		
130	07/10/2020	Travel to and from the attendance at the rental property.	Protected Party's Rental Property		IVP2	IVP2	66.50	66.50	0.40	0.40	26.60	26.60		
131	07/10/2020	Preparing a file note to evidence the attendance at the property on 7 October 2020.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
132	08/10/2020	Engaged in drafting a spreadsheet in respect of the Arbuthnot Latham Deputyship account. Thereafter reconciling the transactions for the period 28 August 2020 to 2 October 2020 to ensure all was in order.			JKL2	JKL2	133.00	133.00	0.50	0.50	66.50	66.50		
133	12/10/2020	Placing a call to United Utilities, due to the confusion as to whether the Protected Party's account was in credit and that there was a refund owing, or if there was an outstanding balance to settle.	United Utilities		JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
134	12/10/2020	Drafting an attendance note to evidence the recent call with the Housing Trust.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
135	12/10/2020	Drafting a file note to document the telephone call with United Utilities.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
136	12/10/2020	Considering non-routine correspondence from the DWP, and noting the Protected Party 's weekly entitlement to DLA.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
137	12/10/2020	Perusing non-routine correspondence from Eon, and noting the payment owing.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
138	13/10/2020	Considering the position as to the clearance of the property and the ongoing tenancy, and noting the next steps in arranging for the chattels to be valued.			ABC2	ABC2	212.00	212.00	0.10	0.10	21.20	21.20		
139	20/10/2020	It was necessary to visit the property to ensure that the building was secure as per the terms of the unoccupied property insurance in place. Also collating any items of post and documentation relating to the Protected Party 's property and financial affairs. Thereafter undertaking a detailed search of the property to locate a will for the Protected Party .	Protected Party's Rental Property		JKL2	JKL2	133.00	133.00	0.80	0.80	106.40	106.40		
140	20/10/2020	Travel to and from the attendance at the rental property.	Protected Party's Rental Property		IVP2	IVP2	66.50	66.50	0.40	0.40	26.60	26.60		
141	21/10/2020	Considering the invoice received, noting the charges, and making payment of the same.	Care Home		JKL2	JKL2	133.00	133.00	0.05	0.05	6.65	6.65		
142	21/10/2020	Reviewing whether the Protected Party had a will in place, and noting that no will had been located at the property.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
143	21/10/2020	Perusing the valuation received, and considering the inventory of each room prepared.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
144	21/10/2020	Reviewing non-routine correspondence from Eon, and noting the electricity charges owing.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
145	21/10/2020	Perusing non-routine correspondence from the Housing Trust, and noting the annual service charge payable.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
146	21/10/2020	Considering non-routine correspondence from United Utilities, and noting the outstanding balance being chased, even though the account had been closed			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
147	22/10/2020	Drafting a file note to evidence the recent telephone call with Care Home.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
148	22/10/2020	Reviewing non-routine correspondence from the Housing Trust, and noting the arrears on the Protected Party 's account.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
149	22/10/2020	Preparing an attendance note to document the visit to the property on 20 October 2020.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
150	22/10/2020	Considering non-routine correspondence from Eon, and noting that statements and bills would now be provided electronically.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
151	22/10/2020	Reviewing the position as to the clearance of the property and terminating of the tenancy, and considering the clearance quote obtained, and the need to arrange a draw down from the Protected Party 's bank accounts to cover the arrears owing to the Housing Trust.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
152	23/10/2020	Conducting a review of the Protected Party 's affairs and creating an agenda of the next steps in arranging the clearance of the property, cancellation of the tenancy, and the closing of the Protected Party 's bank accounts.			ABC2	ABC2	212.00	212.00	0.40	0.40	84.80	84.80		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
153	23/10/2020	Perusing non-routine correspondence from the Pension Service, and noting that the Deputy was now registered against the account.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
154	23/10/2020	Making a best interests decision as to how to proceed in respect of the property clearance and ending the tenancy.			ABC2	ABC2	212.00	212.00	0.10	0.10	21.20	21.20		
155	28/10/2020	Conducting research to identify local Solicitors who may hold a copy of a will for the Protected Party .			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
156	28/10/2020	Drafting a file note to evidence the various calls made to the Solicitor firms.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
157	29/10/2020	Considering the actions to be taken to progress the clearance of the rental property and termination of the tenancy.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
158	29/10/2020	Reviewing non-routine correspondence from British Gas, and noting the projected charges for the period.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
159	29/10/2020	Perusing non-routine correspondence from the Housing Trust, and noting the gas safety check to be conducted.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
160	29/10/2020	Considering non-routine correspondence from United Utilities, and noting the outstanding balance owing.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
161	29/10/2020	Conducting a review of the current position and assessing the course of action to be taken in respect of the property.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
162	30/10/2020	Reviewing the position as to the property, and noting that the Protected Party was current in hospital. Ascertaining the course of action to be taken in settling the rental arrears and terminating the tenancy.			ABC2	ABC2	212.00	212.00	0.30	0.30	63.60	63.60		
163	30/10/2020	Completing the termination of tenancy forms.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
164	30/10/2020	Considering the current position and assessing the actions required to progress matters.			ABC2	ABC2	212.00	212.00	0.10	0.10	21.20	21.20		
165	02/11/2020	Engaged in a call with the Housing Trust, to discuss the issues with the United Utilities account in respect of the property.	Housing Trust		JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
166	02/11/2020	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the current financial position.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
167	02/11/2020	Considering and certifying the termination notice as Deputy.			GHI2	GHI2	260.00	260.00	0.10	0.10	26.00	26.00		
168	02/11/2020	Considering the current position and assessing the actions required to progress matters as Deputy.			GHI2	GHI2	260.00	260.00	0.10	0.10	26.00	26.00		
169	04/11/2020	It was necessary to visit the property to ensure that the building was secure as per the terms of the unoccupied property insurance in place. Also collating any items of post and documentation relating to the Protected Party 's property and financial affairs.	Protected Party's Rental Property		JKL2	JKL2	133.00	133.00	0.30	0.30	39.90	39.90		
170	04/11/2020	Travel to and from the attendance at the rental property.	Protected Party's Rental Property		IVP2	IVP2	66.50	66.50	0.40	0.40	26.60	26.60		
171	04/11/2020	Drafting a file note to evidence the recent attendance at the property.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		

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172	11/11/2020	Engaged in a call with the Protected Party.	Protected Party		DEF2	DEF2	175.00	175.00	0.50	0.50	87.50	87.50		
173	11/11/2020	Reviewing non-routine correspondence from Eon, and noting the charges outstanding.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
174	16/11/2020	Considering the next steps in arranging for the clearance of the property, and making a note of the items which the Protected Party wished to retain.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
175	17/11/2020	Reviewing the progress made in clearing the property, however noting that the TV requested by the Protected Party could not be located.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
176	18/11/2020	Attending at the property to undertake a full clearance of the belongings and items inside. Also ensuring that the property was safe and secure in line with the insurance requirements, and collating any items of post.	Protected Party's Rental Property		JKL2	JKL2	133.00	133.00	2.00	2.00	266.00	266.00		
177	18/11/2020	Travel to and from the attendance at the rental property.	Protected Party's Rental Property		JKL2	JKL2	133.00	133.00	0.40	0.40	53.20	53.20		
178	18/11/2020	Preparing an attendance note to document the visit to the property.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
179	20/11/2020	Considering the care fee invoice received, and thereafter preparing a payment in settlement of the same.	Care Home		JKL2	JKL2	133.00	133.00	0.05	0.05	6.65	6.65		
180	20/11/2020	Contacting United Utilities, and explaining the issues arising with the Protected Party's account being under the incorrect name. Explaining the urgent nature of needing clarification due to the termination of the tenancy which was upcoming.	United Utilities		JKL2	JKL2	133.00	133.00	0.30	0.30	39.90	39.90		

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181	20/11/2020	Drafting a file note to evidence the recent telephone call with United Utilities.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
182	20/11/2020	Reviewing the progress made in respect of the property clearance, and noting the next steps in obtaining final meter readings.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
183	20/11/2020	Perusing non-routine correspondence from Halifax, and noting the requirement of the Deputy attending in branch in order to close the account.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
184	20/11/2020	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the current financial position.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
185	20/11/2020	Considering the current position in respect of the Halifax account, and noting the next steps in arranging for the Deputy to attend in branch.			ABC2	ABC2	212.00	212.00	0.10	0.10	21.20	21.20		
186	23/11/2020	Perusing non-routine correspondence from United Utilities, and noting the outstanding balance on the water account.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
187	23/11/2020	Reviewing further correspondence from United Utilities, and amending the financial schedule accordingly.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
188	25/11/2020	Considering the position as to the annual supervision fee, and noting that the Protected Party was no longer in receipt of pension credit, and that therefore the exemption needed to be cancelled.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
189	25/11/2020	Perusing non-routine correspondence from Liberty, and noting the gas safety check appointment in place.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		

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190	25/11/2020	Completing the OPG120 in order to apply for a fee remission.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
191	26/11/2020	Speaking with United Utilities, and being advised that the account could not be discussed with the fee earner. Explaining of the ongoing issues and delays faced and that this was a matter of urgency.	United Utilities		JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
192	27/11/2020	It was necessary to visit the property to ensure that the building was secure as per the terms of the unoccupied property insurance in place. Also collating any items of post and documentation relating to the Protected Party 's property and financial affairs. Taking the final meter readings as to tenancy was due to end shortly.	Protected Party's Rental Property		JKL2	JKL2	133.00	133.00	0.40	0.40	53.20	53.20		
193	27/11/2020	Travel to and from the attendance at the rental property.	Protected Party's Rental Property		IVP2	IVP2	66.50	66.50	0.40	0.40	26.60	26.60		
194	27/11/2020	Drafting a file note to evidence the recent attendance at the property.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
195	30/11/2020	The fee earner attended at the property in order to hand over the keys to the Housing Trust, as the tenancy had now been terminated.	Protected Party's Rental Property		JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
196	30/11/2020	Travel to and from the attendance at the rental property.	Protected Party's Rental Property		JKL2	JKL2	133.00	133.00	0.40	0.40	53.20	53.20		
197	01/12/2020	Preparing an attendance note to document the telephone call with United Utilities.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
198	02/12/2020	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the current financial position.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
199	02/12/2020	Preparing a file note to evidence the attendance at the property on 30 November 2020.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
200	04/12/2020	Considering non-routine correspondence from United Utilities, and noting the refund received in respect of the water account.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
201	10/12/2020	Perusing non-routine correspondence from Halifax, and noting that a cheque book was not available for the Protected Party's account.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
202	12/12/2020	Attending on the Protected Party for a review meeting.	Protected Party		GHI2	GHI2	260.00	260.00	1.00	1.00	260.00	260.00		
203	14/12/2020	Reviewing non-routine correspondence from Eon, and noting the outstanding balance.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
204	18/12/2020	Undertaking a detailed review of the Protected Party 's matter, including his residence and finances, and creating an agenda of the next steps to be taken.			JKL2	JKL2	133.00	133.00	0.60	0.60	79.80	79.80		
205	18/12/2020	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the current financial position.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
206	01/01/2021	Considering non-routine correspondence from the OPG, and noting the response given to the fee remission application made.			GHI2	GHI2	260.00	260.00	0.10	0.10	26.00	26.00		
207	04/01/2021	Perusing the care fee invoice received, and making a payment in settlement of the same.	Care Home		JKL2	JKL2	133.00	133.00	0.05	0.05	6.65	6.65		
208	04/01/2021	Reviewing non-routine correspondence from the OPG, and noting that the fee remission had been approved.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
209	04/01/2021	Considering non-routine correspondence from British Gas, and noting the key details.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
210	06/01/2021	Perusing non-routine correspondence from Eon, and noting the payment which was overdue.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
211	07/01/2021	Reviewing the invoice received in respect of the property clearance, and preparing a payment in settlement of the same.	Clearance Agent		JKL2	JKL2	133.00	133.00	0.05	0.05	6.65	6.65		
212	11/01/2021	Considering the rental arrear statement received from the Housing Trust, and ascertaining whether sufficient funds were held to settle the same.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
213	11/01/2021	Reviewing the Protected Party 's background and circumstances, and creating an agenda of the next steps required to progress matters.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
214	11/01/2021	Perusing non-routine correspondence from Halifax, and noting that the current account had now been closed.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
215	11/01/2021	Considering non-routine correspondence from Eon, and noting the amount outstanding to be passed to a debt collection agency.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
216	11/01/2021	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the current financial position.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
217	20/01/2021	Perusing non-routine correspondence from Tokio Marine, and noting the bond renewal date.			ABC2	ABC2	212.00	212.00	0.10	0.10	21.20	21.20		
218	25/01/2021	Considering non-routine correspondence from Eon, and noting the arrears on the electricity account.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
219	25/01/2021	Reviewing non-routine correspondence from the Pension Service, and noting that the Protected Party was due to receive a cold weather payment.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
220	25/01/2021	Perusing non-routine correspondence from the Pension Service, and extracting the key information.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
221	29/01/2021	Considering non-routine correspondence from NS&I, and noting the current balance of funds held.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
222	04/02/2021	Reviewing non-routine correspondence from the DWP, and noting the increased pension payments.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
223	04/02/2021	Reviewing and revising the schedule of assets, income and expenditure, to ensure that the same reflected the current financial position			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
224	05/02/2021	Considering non-routine correspondence from the DWP, and noting that the Protected Party's DLA payment would be stopping.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
225	08/02/2021	Perusing non-routine correspondence from the DWP, regarding the potential overpayment made to the Protected Party .			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
226	10/02/2021	Speaking with the Housing Trust, and obtaining the bank details for payment of the rental arrears.	Housing Trust		JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
227	10/02/2021	Preparing a file note to evidence the telephone call with the Housing Trust.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
228	10/02/2021	Considering non-routine correspondence from the DWP, and noting the payment owing to the Protected Party .			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		

No	Date	Description	Party	Finding Text	FE Claimed	FE Allowed	FE Rate Claimed	FE Rate Allowed	Time Claimed	Time Allowed	Profit Claimed	Profit Allowed	Disbs. Claimed	Disbs. Allowed
229	10/02/2021	Drafting lengthy email correspondence to the Housing Trust.			JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
230	12/02/2021	Reviewing the current level of funds held, to ensure sufficient monies were available to cover upcoming expenditure.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
231	18/02/2021	Perusing non-routine correspondence from the Pension Service, and noting the salient points.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
232	25/02/2021	Considering the Protected Party's previous request for a TV, and noting the actions required to progress matters.			JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
233	(blank)	5 Telephone Calls	Protected Party		JKL2	JKL2	133.00	133.00	0.50	0.50	66.50	66.50		
234	(blank)	4 Telephone Calls	Protected Party		ABC2	ABC2	212.00	212.00	0.40	0.40	84.80	84.80		
235	(blank)	4 Telephone Calls	Protected Party		DEF2	DEF2	175.00	175.00	0.40	0.40	70.00	70.00		
236	(blank)	4 Telephone Calls	Protected Party		GHI2	GHI2	260.00	260.00	0.40	0.40	104.00	104.00		
237	(blank)	4 Letters	Protected Party		JKL2	JKL2	133.00	133.00	0.40	0.40	53.20	53.20		
238	(blank)	3 Letters	Protected Party		ABC2	ABC2	212.00	212.00	0.30	0.30	63.60	63.60		
239	(blank)	5 Letters	Protected Party		DEF2	DEF2	175.00	175.00	0.50	0.50	87.50	87.50		
240	(blank)	3 Letters	Protected Party		GHI2	GHI2	260.00	260.00	0.30	0.30	78.00	78.00		
241	(blank)	7 Letters	Housing Trust		JKL2	JKL2	133.00	133.00	0.70	0.70	93.10	93.10		
242	(blank)	1 Letter	Arbuthnot Latham		JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
243	(blank)	2 Letters	Halifax		JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
244	(blank)	2 Letters	Deputy		JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
245	(blank)	1 Letter	OPG		JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
246	(blank)	2 Telephone Calls	Care Home		JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
247	(blank)	2 Letters	Care Home		JKL2	JKL2	133.00	133.00	0.20	0.20	26.60	26.60		
248	(blank)	1 Letter	Social Worker		JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
249	(blank)	2 Enclosure Letters	Property Team		JKL2	JKL2	133.00	133.00	0.10	0.10	13.30	13.30		
250	(blank)	Checking and filing the Bill of Costs			GHI2	GHI2	260.00	260.00	0.40	0.40	104.00	104.00		
251	(blank)	Law Costs Draftsman - Preparing and drafting the Bill of Costs, limited to 3.2 hours @ £133.00											425.60	425.60
									63.00	63.00	8691.20	8691.20	432.35	432.35

Bill Summary

	Claimed	Allowed
Profit Costs	8,691.20	8,691.20
VAT	1,738.24	1,738.24
Disbursements	432.35	432.35
VAT	86.47	86.47
Total	10,948.26	10,948.26
Assessment Fee	87.00	87.00
Grand Total	11,035.26	11,035.26

Provisionally assessed:	<input type="text"/>
By Costs Officer	<input type="text"/>

Directions/comments/subject to:

Summary By Activity

Activity Name	Claimed Profit Costs	Claimed VAT	Allowed Profit Costs	Allowed VAT
Personal Attendances	1132.10	226.42	1132.10	226.42
Timed Telephone Calls	698.00	139.60	698.00	139.60
Telephone Calls	1285.40	257.08	1285.40	257.08
Timed Letters	33.30	6.66	33.30	6.66
Letters	1840.30	368.06	1840.30	368.06
Enclosure Letters	55.50	11.10	55.50	11.10
Billable travel and waiting time	442.90	88.58	442.90	88.58
Plan, Prepare, Draft, Review	3033.15	606.63	3033.15	606.63
Arranging electronic payment	42.15	8.43	42.15	8.43
Arranging cheque payment	24.40	4.88	24.40	4.88
Bill of costs	104.00	20.80	104.00	20.80
	8691.20	1738.24	8691.20	1738.24

Summary Of Communications

External Party Name	Activity Name	Claimed Time	Claimed Profit Costs	Allowed Time	Allowed Profit Costs
Protected Party	Personal Attendances	1.50	368.50	1.50	368.50
	Timed Telephone Calls	3.00	508.30	3.00	508.30
	Telephone Calls	6.50	1,036.80	6.50	1,036.80
	Letters	5.40	856.00	5.40	856.00
Protected Party Total		16.40	2,769.60	16.40	2,769.60
Arbuthnot Latham	Timed Letters	0.30	33.30	0.30	33.30
	Letters	0.30	35.50	0.30	35.50
Arbuthnot Latham Total		0.60	68.80	0.60	68.80
Care Home	Personal Attendances	0.30	65.10	0.30	65.10
	Timed Telephone Calls	0.20	43.40	0.20	43.40
	Telephone Calls	0.50	59.90	0.50	59.90
	Letters	0.40	48.80	0.40	48.80
Care Home Total		1.40	217.20	1.40	217.20
Protected Party's Rental Property	Personal Attendances	5.50	698.50	5.50	698.50
Protected Party's Rental Property Total		5.50	698.50	5.50	698.50
Housing Trust	Timed Telephone Calls	0.40	53.20	0.40	53.20
	Telephone Calls	0.20	22.20	0.20	22.20
	Letters	2.30	277.30	2.30	277.30
Housing Trust Total		2.90	352.70	2.90	352.70
Halifax	Letters	0.90	110.90	0.90	110.90
Halifax Total		0.90	110.90	0.90	110.90
NS&I	Letters	0.20	22.20	0.20	22.20
NS&I Total		0.20	22.20	0.20	22.20
Pension Credit	Letters	0.40	44.40	0.40	44.40
Pension Credit Total		0.40	44.40	0.40	44.40

Pension Service	Letters	0.20	22.20	0.20	22.20
Pension Service Total		0.20	22.20	0.20	22.20
Deputy	Letters	0.40	52.30	0.40	52.30
Deputy Total		0.40	52.30	0.40	52.30
OPG	Letters	0.40	46.60	0.40	46.60
OPG Total		0.40	46.60	0.40	46.60
Community Mental Health Team	Telephone Calls	0.10	11.10	0.10	11.10
Community Mental Health Team Total		0.10	11.10	0.10	11.10
DWP	Letters	0.50	55.50	0.50	55.50
DWP Total		0.50	55.50	0.50	55.50
TV Licensing	Letters	0.10	11.10	0.10	11.10
TV Licensing Total		0.10	11.10	0.10	11.10
Eon	Telephone Calls	0.10	11.10	0.10	11.10
	Letters	0.30	33.30	0.30	33.30
Eon Total		0.40	44.40	0.40	44.40
United Utilities	Timed Telephone Calls	0.70	93.10	0.70	93.10
	Telephone Calls	0.40	44.40	0.40	44.40
	Letters	0.50	55.50	0.50	55.50
United Utilities Total		1.60	193.00	1.60	193.00
British Gas	Letters	0.30	33.30	0.30	33.30
British Gas Total		0.30	33.30	0.30	33.30
Yorkshire Building Society	Letters	0.10	11.10	0.10	11.10
Yorkshire Building Society Total		0.10	11.10	0.10	11.10
Protected Party's Mother	Letters	0.40	44.40	0.40	44.40
	Enclosure Letters	0.25	27.75	0.25	27.75
Protected Party's Mother Total		0.65	72.15	0.65	72.15
RSA	Letters	0.10	11.10	0.10	11.10

RSA Total		0.10	11.10	0.10	11.10
Yorkshire Bank	Letters	0.10	11.10	0.10	11.10
Yorkshire Bank Total		0.10	11.10	0.10	11.10
Case Manager	Telephone Calls	0.20	22.20	0.20	22.20
	Enclosure Letters	0.25	27.75	0.25	27.75
Case Manager Total		0.45	49.95	0.45	49.95
Court	Telephone Calls	0.20	22.20	0.20	22.20
Court Total		0.20	22.20	0.20	22.20
Counsel	Telephone Calls	0.10	11.10	0.10	11.10
Counsel Total		0.10	11.10	0.10	11.10
High Street Solicitors	Telephone Calls	0.40	44.40	0.40	44.40
	Letters	0.30	33.30	0.30	33.30
High Street Solicitors Total		0.70	77.70	0.70	77.70
Clearance Agent	Letters	0.10	11.10	0.10	11.10
Clearance Agent Total		0.10	11.10	0.10	11.10
Social Worker	Letters	0.10	13.30	0.10	13.30
Social Worker Total		0.10	13.30	0.10	13.30
Grand Total		34.90	5,044.60	34.90	5,044.60

Summary By Fee Earner Grade

FE Grade Claimed	FE Grade Allowed	FE Rate Claimed	FE Rate Allowed	Claimed Time	Claimed Profit Costs	Allowed Time	Allowed Profit Costs
		-	-				
A	A	217.00	217.00	3.40	737.80	3.40	737.80
A	A	260.00	260.00	2.40	624.00	2.40	624.00
B	B	177.00	177.00	5.00	885.00	5.00	885.00
B	B	212.00	212.00	1.90	402.80	1.90	402.80
C	C	146.00	146.00	3.10	452.60	3.10	452.60
C	C	175.00	175.00	1.40	245.00	1.40	245.00
D	D	55.50	55.50	1.60	88.80	1.60	88.80
D	D	66.50	66.50	1.60	106.40	1.60	106.40
D	D	111.00	111.00	23.50	2608.50	23.50	2608.50
D	D	133.00	133.00	19.10	2540.30	19.10	2540.30
Grand Total				63.00	8691.20	63.00	8691.20

I certify that:

The bill is both accurate and complete

No payments have been made by any paying party on account of costs included in the bill

or

Payments have been made on account of costs included in this bill of costs in the total sum of

All disbursements listed in this bill which individually do not exceed £500 (other than those relating to Counsel's fees) have been duly discharged.

We certify that fixed costs have not been taken for any work claimed herein

Name

Firm

POST ASSESSMENT CERTIFICATES

I certify that:

I certify that the castings of this bill are correct

Name

Firm

**IN THE COURT OF PROTECTION
MENTAL CAPACITY ACT 2005**

Claim No
SCCO Reference

12345678
SC-1900-COP-000001

PATIENT: John Smith

**PLEASE COMPLETE THE SUMMARY BELOW BEFORE SUBMITTING YOUR BILL FOR A CERTIFICATE.
FAILURE TO COMPLETE THE SUMMARY, WILL RESULT IN YOUR BILL BEING RETURNED.**

	Profit Costs	Disbursements <small>(excluding assessment fee)</small>	VAT	Total Costs
Amount of Original Bill	8,691.20	432.35	1,824.71	10,948.26
- Amount Disallowed	-	-	-	-
Allowed Amount	8,691.20	432.35	1,824.71	10,948.26
		Cost of Assessment		87.00
		Grand Total		

Have you complied with the Costs officer's directions, if any?
(if not please give reasons)

If required by the Cost Officer to serve the bill on interested party/parties
please give date of service.

11,035.26

Final Costs Certificate

To the Deputy's solicitors

321 Legal
1 Main Street Birmingham B2 5LL

In the High Court of Justice Senior Courts Costs Office	
S.C.C.O. Ref:	SC-1900-COP-000001
Sent from: Court of Protection	
Case No.	12345678
Patient/Donor	John Smith
Solicitor's Ref.	Ref: GHI/1/2/3
Date	(Insert Date)

In accordance with the First General Order dated 03/03/2020 and the General Direction dated 19/11/1982

Upon the Deputy filing a completed bill of costs in respect of general management of the protected party's affairs for the period 03/03/2020 to 02/03/2021

Costs Officer

has assessed the total costs at
inclusive of
(including

11,035.26
1,824.71
87.00

V.A.T.

for the costs of the detailed
assessment)

The Senior Courts Costs Office, Court of Protection Section, Thomas More Building, Royal Courts of Justice, Strand, London, WC2A 2LL is open between 10.00 a.m. and 4.30 p.m. Monday to Friday. When corresponding with the court, please address forms and letters to the Court Manager and quote the SCCO reference number.
