

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

OPG Case No. 12345678

SCCO Reference: SC-1900-COP-000001
(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 Firm

Address

DX Address

Solicitor's Reference

Email

(for return of assessed bill)

VAT No.

321 Legal

1 Main Street
Birmingham
B2 5LL

DX 123456 BIRMINGHAM

Ref: GHI/1/2/3

georgia.ison@321legal.co.uk

GB 12345678

Background Information

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|-----------------------------|
| Assessor's Comments: |
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| OPG105 overall figure of estimated costs for this period (if general management): |
| £9,000.00 |

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| 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)'.

PARTIES & CHRONOLOGY (where required)

| Party | Name & Representative |
|-------|-----------------------|
|-------|-----------------------|

| 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 | |

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. Ascertaining 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 | | |

| 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 |
|----|------------|---|-----------------------------------|--------------|------------|------------|-----------------|-----------------|--------------|--------------|----------------|----------------|----------------|----------------|
| 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 | | |
| 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 | | |

| 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 |
|----|------------|---|-----------------------------------|--------------|------------|------------|-----------------|-----------------|--------------|--------------|----------------|----------------|----------------|----------------|
| 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 | | |
| 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 | | |

| 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 |
|----|------------|---|-----------------------------------|--------------|------------|------------|-----------------|-----------------|--------------|--------------|----------------|----------------|----------------|----------------|
| 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 | | |
| 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 | | |

| 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 |
|----|------------|--|-----------------|--------------|---------------|---------------|--------------------|--------------------|-----------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| 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 | | |
| 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 | | |

| 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 |
|----|------------|--|-----------------------------------|--------------|------------|------------|-----------------|-----------------|--------------|--------------|----------------|----------------|----------------|----------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|---|------------------------------|--------------|------------|------------|-----------------|-----------------|--------------|--------------|----------------|----------------|----------------|----------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|--|-----------------------------------|--------------|------------|------------|-----------------|-----------------|--------------|--------------|----------------|----------------|----------------|----------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|---|--------------------------------------|--------------|---------------|---------------|--------------------|--------------------|-----------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|--|-----------|--------------|---------------|---------------|--------------------|--------------------|-----------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|---|-------|--------------|------------|------------|-----------------|-----------------|--------------|--------------|----------------|----------------|----------------|----------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|---|---------------|--------------|------------|------------|-----------------|-----------------|--------------|--------------|----------------|----------------|----------------|----------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|---|-----------------------------------|--------------|------------|------------|-----------------|-----------------|--------------|--------------|----------------|----------------|----------------|----------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|---|-----------------------------------|--------------|---------------|---------------|--------------------|--------------------|-----------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|---|--------------------------------------|--------------|---------------|---------------|--------------------|--------------------|-----------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|--|-----------------------------------|--------------|------------|------------|-----------------|-----------------|--------------|--------------|----------------|----------------|----------------|----------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|---|-----------------|--------------|---------------|---------------|--------------------|--------------------|-----------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|------------|---|-------|--------------|---------------|---------------|--------------------|--------------------|-----------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| 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 | | |
| 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 | | |

| 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 |
|-------------|------------|---|-----------------|--------------|------------|------------|-----------------|-----------------|--------------|--------------|----------------|----------------|----------------|----------------|
| 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 | | |
| 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 | | |

| 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 |
|-----|---------|---|------------------|--------------|---------------|---------------|--------------------|--------------------|-----------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| 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 | FE Grade Claimed | Claimed Profit Costs | Claimed VAT | Allowed Profit Costs | Allowed VAT |
|---|------------------|----------------------|---------------|----------------------|---------------|
| Personal Attendances | A | 433.60 | 86.72 | 433.60 | 86.72 |
| | D | 698.50 | 139.70 | 698.50 | 139.70 |
| Personal Attendances Total | | 1132.10 | 226.42 | 1132.10 | 226.42 |
| Timed Telephone Calls | A | 43.40 | 8.68 | 43.40 | 8.68 |
| | B | 318.60 | 63.72 | 318.60 | 63.72 |
| | C | 189.70 | 37.94 | 189.70 | 37.94 |
| | D | 146.30 | 29.26 | 146.30 | 29.26 |
| Timed Telephone Calls Total | | 698.00 | 139.60 | 698.00 | 139.60 |
| Telephone Calls | A | 255.90 | 51.18 | 255.90 | 51.18 |
| | B | 261.80 | 52.36 | 261.80 | 52.36 |
| | C | 230.60 | 46.12 | 230.60 | 46.12 |
| | D | 537.10 | 107.42 | 537.10 | 107.42 |
| Telephone Calls Total | | 1285.40 | 257.08 | 1285.40 | 257.08 |
| Timed Letters/Emails Out | D | 33.30 | 6.66 | 33.30 | 6.66 |
| Timed Letters/Emails Out Total | | 33.30 | 6.66 | 33.30 | 6.66 |
| Letters/Emails Out | A | 186.50 | 37.30 | 186.50 | 37.30 |
| | B | 240.60 | 48.12 | 240.60 | 48.12 |
| | C | 248.10 | 49.62 | 248.10 | 49.62 |
| | D | 1165.10 | 233.02 | 1165.10 | 233.02 |
| Letters/Emails Out Total | | 1840.30 | 368.06 | 1840.30 | 368.06 |
| Enclosure Letters/Emails Out | D | 55.50 | 11.10 | 55.50 | 11.10 |
| Enclosure Letters/Emails Out Total | | 55.50 | 11.10 | 55.50 | 11.10 |
| Billable travel and waiting time | A | 130.20 | 26.04 | 130.20 | 26.04 |
| | D | 312.70 | 62.54 | 312.70 | 62.54 |
| Billable travel and waiting time Total | | 442.90 | 88.58 | 442.90 | 88.58 |
| Plan, Prepare, Draft, Review | A | 208.20 | 41.64 | 208.20 | 41.64 |
| | B | 466.80 | 93.36 | 466.80 | 93.36 |
| | C | 29.20 | 5.84 | 29.20 | 5.84 |
| | D | 2328.95 | 465.79 | 2328.95 | 465.79 |
| Plan, Prepare, Draft, Review Total | | 3033.15 | 606.63 | 3033.15 | 606.63 |
| Arranging electronic payment | D | 42.15 | 8.43 | 42.15 | 8.43 |
| Arranging electronic payment Total | | 42.15 | 8.43 | 42.15 | 8.43 |
| Arranging cheque payment | D | 24.40 | 4.88 | 24.40 | 4.88 |
| Arranging cheque payment Total | | 24.40 | 4.88 | 24.40 | 4.88 |

| | | | | | |
|---------------------|---|---------|---------|---------|---------|
| Bill of costs | A | 104.00 | 20.80 | 104.00 | 20.80 |
| Bill of costs Total | | 104.00 | 20.80 | 104.00 | 20.80 |
| | | | 86.47 | | 86.47 |
| Total | | | 86.47 | | 86.47 |
| | | 8691.20 | 1824.71 | 8691.20 | 1824.71 |

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/Emails Out | 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/Emails Out | 0.30 | 33.30 | 0.30 | 33.30 |
| | Letters/Emails Out | 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/Emails Out | 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/Emails Out | 2.30 | 277.30 | 2.30 | 277.30 |
| Housing Trust Total | | 2.90 | 352.70 | 2.90 | 352.70 |
| Halifax | Letters/Emails Out | 0.90 | 110.90 | 0.90 | 110.90 |
| Halifax Total | | 0.90 | 110.90 | 0.90 | 110.90 |
| NS&I | Letters/Emails Out | 0.20 | 22.20 | 0.20 | 22.20 |
| NS&I Total | | 0.20 | 22.20 | 0.20 | 22.20 |
| Pension Credit | Letters/Emails Out | 0.40 | 44.40 | 0.40 | 44.40 |
| Pension Credit Total | | 0.40 | 44.40 | 0.40 | 44.40 |

| | | | | | |
|---|------------------------------|-------------|---------------|-------------|---------------|
| Pension Service | Letters/Emails Out | 0.20 | 22.20 | 0.20 | 22.20 |
| Pension Service Total | | 0.20 | 22.20 | 0.20 | 22.20 |
| Deputy | Letters/Emails Out | 0.40 | 52.30 | 0.40 | 52.30 |
| Deputy Total | | 0.40 | 52.30 | 0.40 | 52.30 |
| OPG | Letters/Emails Out | 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/Emails Out | 0.50 | 55.50 | 0.50 | 55.50 |
| DWP Total | | 0.50 | 55.50 | 0.50 | 55.50 |
| TV Licensing | Letters/Emails Out | 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/Emails Out | 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/Emails Out | 0.50 | 55.50 | 0.50 | 55.50 |
| United Utilities Total | | 1.60 | 193.00 | 1.60 | 193.00 |
| British Gas | Letters/Emails Out | 0.30 | 33.30 | 0.30 | 33.30 |
| British Gas Total | | 0.30 | 33.30 | 0.30 | 33.30 |
| Yorkshire Building Society | Letters/Emails Out | 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/Emails Out | 0.40 | 44.40 | 0.40 | 44.40 |
| | Enclosure Letters/Emails Out | 0.25 | 27.75 | 0.25 | 27.75 |
| Protected Party's Mother Total | | 0.65 | 72.15 | 0.65 | 72.15 |
| RSA | Letters/Emails Out | 0.10 | 11.10 | 0.10 | 11.10 |

| | | | | | |
|-------------------------------------|------------------------------|--------------|-----------------|--------------|-----------------|
| RSA Total | | 0.10 | 11.10 | 0.10 | 11.10 |
| Yorkshire Bank | Letters/Emails Out | 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/Emails Out | 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/Emails Out | 0.30 | 33.30 | 0.30 | 33.30 |
| High Street Solicitors Total | | 0.70 | 77.70 | 0.70 | 77.70 |
| Clearance Agent | Letters/Emails Out | 0.10 | 11.10 | 0.10 | 11.10 |
| Clearance Agent Total | | 0.10 | 11.10 | 0.10 | 11.10 |
| Social Worker | Letters/Emails Out | 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 |

PRE ASSESSMENT CERTIFICATE

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

Georgia Ison

Firm

321 Legal

POST ASSESSMENT CERTIFICATE

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 | 12345678 |
| SCCO Reference | 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 (excluding assessment fee) | 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 | | 11,035.26 |

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.

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.
