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SCHEDULE OF OUTGOINGS FOR DEPENDENT ADULT DAUGHTER

Anna suffers from Bipolar Disorder. Six months prior to her death, Anna's mother altered her Will in favour of Anna's son, her grandson. Anna was expecting to receive a 50% share of the Estate. Anna is only able to work intermittently and there is no certainty as to whether she will be able to continue working in the future. She is in her 50s and her husband is unemployed.

Pennywise were instructed by Anna's lawyer to create an accurate Schedule of Outgoings to enable her to project Anna's future needs, taking into account her committed spending and personal expenditure including holidays. Although Anna had prepared some figures, her lawyer was keen to engage an independent party to prepare a proper schedule to ensure its accuracy and provide impartiality.

Anna's case settled at mediation and her lawyer has confirmed that our report definitely helped them achieve a good result for their client.

For further details visit www.pennywiseconsultants.co.uk
or call the office to discuss your requirements.

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CHALLENGE TO SCHEDULE OF NEEDS

Barbara had been married to Bob for 30 years and enjoyed a lavish standard of living. When Bob died she had expected to be left well provided for, but Bob left the majority of his Estate to his two children from his first marriage.

When Barbara submitted her Schedule of Needs it was challenged by the opposing law firm. Pennywise were engaged to thoroughly analyse and categorise Barbara's spending over the 12 months prior to Bob's death. Pennywise were furnished with both parties bank and credit card statements. We were also asked to estimate the committed costs for the large flat Barbara is planning on moving to.

Analysis of Barbara's expenditure confirmed conclusively her standard of living during her marriage. The case is ongoing.

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