



Probate Questionnaire

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ABOUT THE DECEASED

Please supply the following information about the person who has died

Full Name of the Deceased: _____

Previous Name(s): _____

Date of Death: _____
(Please supply three original Death Certificates)

Date of Birth: _____

National Insurance Number: _____

Tax Office: _____

Tax Reference Number: _____

If the Deceased was a widow/widower, please supply his/her marriage certificate so that we can make a copy

Number of children of the Deceased: _____

Was the Deceased born in England/Wales? YES _____ NO _____

If not, what year did he/she come to live here? _____

EXECUTORS/ADMINISTRATORS

In respect of each executor, please supply the following information. If there is no Will, please supply the same information for each person who will be dealing with the estate (administrator):

Executor/Administrator 1:

Full name: _____

Address: _____

Email: _____

Telephone Number: _____

EXECUTORS/ADMINISTRATORS CONTINUED

Executor/Administrator 2:

Full name: _____

Address: _____

Email: _____

Telephone Number: _____

Executor/Administrator 3:

Full name: _____

Address: _____

Email: _____

Telephone Number: _____

Executor/Administrator 4:

Full name: _____

Address: _____

Email: _____

Telephone Number: _____

BENEFICIARIES

Please advise if any of the beneficiaries named in the Will died before the Deceased:

BENEFICIARIES CONTINUED

Please supply current addresses for all the beneficiaries, unless these appear in the Will:

Full name: _____

Address: _____

Full name: _____

Address: _____

Full name: _____

Address: _____

Please supply contact details for the Deceased's accountants/financial adviser/stockbroker (if any):

Contact: _____

Organisation: _____

Address: _____

Contact: _____

Organisation: _____

Address: _____

THE DECEASED'S ASSETS

Please supply statements and passbooks for the Deceased's bank and building society accounts, whether in the Deceased's SOLE name or held JOINTLY with any other person.

Please list the accounts below:

Bank/Building Society	Account/Roll Number

Please supply certificates/statements and the most recent dividend/distribution slips for the Deceased's shares or other investments. If you think the Deceased might have had any other shares or investments, please tell us:

Please supply original National Savings certificates and premium bonds/holder card.

Was any cash found in the Deceased's possession? If so, how much?

If the Deceased had a car, please advise:

MAKE	MODEL	YEAR OF MANUFACTURE	REGISTRATION NUMBER	VALUE

Please Note: You should check you are insured before driving the Deceased's car.

THE DECEASED'S ASSETS CONTINUED

Did the Deceased have any jewellery or watches? If so, what is its/their value?

*Please note that if any individual item is worth more than £500, a professional valuation should be obtained.
Items of value should not be left in the Deceased's empty property*

Did the Deceased have any other items of value e.g. clothes, handbags, hobby equipment? If so, please provide a description and estimated value:

THE DECEASED'S HOME

Was it owned solely or in joint names?

Where are the title deeds?

Estimated value:

Please provide an estimated value of the contents, ie carpets and curtains, furniture, audio-visual equipment and other valuables. If the Deceased had artwork or antiques then a professional valuation would be advisable

Did the Deceased own any other property? If so, on a continuation sheet, please provide the address of the property and the same information as we have required for the Deceased's home.

Please provide details of any business assets

Please provide details of any foreign assets

Was the Deceased expecting to receive any money at the time of his/her death? YES _____ NO _____

If yes, please provide details:

THE DECEASED'S ASSETS CONTINUED

We may be able to reclaim Income Tax for the tax year in which the Deceased died. Therefore, please advise any pensions/annuities from which the Deceased received an income:

PENSION/ANNUITY PROVIDER	REFERENCE NUMBER

LIABILITIES AND FUNERAL EXPENSES

Please provide us with the funeral invoice. We can liaise with the Deceased's bank to arrange payment of the invoice by them if there are sufficient funds in the Deceased's account.

Please let us have all the invoices for costs associated with the funeral eg flowers, funeral tea, death notice. All these can be set against the value of the estate for Inheritance Tax purposes.

Please supply copies of all outstanding bills e.g. credit cards, utility bills etc.

Did the Deceased leave any other liabilities or are you aware of any potential claim against the estate? YES _____ NO _____

If yes, please provide details below:

YOUR CONTACT DETAILS

Full name: _____

Address: _____

Telephone Number: _____ Email: _____

Contacts

If you have any queries please do not hesitate to contact a member of our dedicated team.

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