

Private Client Probate Questionnaire

Please complete this questionnaire as fully as possible and either return it to us prior to our meeting or bring it along with you to our meeting. Please also bring with you any supporting documentation or papers which you think may be relevant

PROBATE QUESTIONNAIRE

PARTICULARS OF THE DECEASED

Forenames:Surname:

Known by any other names?

Date of Death: Date of Birth:

Last Usual Address:

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Marital status: married single divorced widowed

(i) If widowed, please give the deceased spouse's date of death

(ii) If divorced, please give details of divorce

Occupation:

Surviving relatives: spouse children parents

Have any of the addresses of the beneficiaries in the Will changed?

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Has the funeral bill been paid? Please can you let us have a copy or arrange for it to be sent to us and we will arrange payment.

Please attach 2 copies of the original death certificate.

Is there a Will? If so, where is it?

Did the deceased leave any letter of wishes with their Will?

TAX DETAILS

Domicile: England & Wales Scotland N.Ireland Abroad

Tax District:

National Insurance Number:

Tax Ref:

Did the deceased have accountants?

Have tax returns been filed for the year ending April 2005?

GIFTS, NOMINATIONS, JOINT PROPERTY & TRUSTS

Did the deceased make any gifts over £3,000 within 7 years of death? If so, were they outright gifts or did the deceased retain any benefit in the asset?

Date: Property:

Value: Donee:

Did the deceased create or have any interests in any trusts? If so, please provide a copy of the trust deed.

Date of trust: Name of Settlor:

Deceased's interest: Solicitors dealing:

Did the deceased nominate anyone to receive the benefit of any life policies or death in benefit scheme?

Policy: Beneficiary:

Value: Life Company:

Did the deceased have any joint property as at the date of death?

Asset: Property Bank account Investments

Description: Joint holder:

Date begun: How funded:

Income paid to:

DETAILS OF ASSETS (INCLUDING ANY FOREIGN ASSETS)

Please bring with you to our meeting documentation relating to the deceased's assets which may include the following:-

- Bank Account details (including account number, address)
- Building Society Account details (including account number, address)
- National Savings Certificates (including account number, address)
- National Savings Bank (including account number, address)
- Premium Bonds
- Shares (share certificates and dividend vouchers, if any)
- Did the deceased leave any loose cash? Please let us know details
- Debts due to the deceased
- Pension details (state and private)
- Business interests
- Life policies
- Property – any valuations obtained, details of where the title deeds are, whether it is freehold or leasehold and details of any joint owners
- Was the deceased a beneficiary of someone else's estate at their death?
- Other assets – e.g. any salary owing to the deceased

DETAILS OF LIABILITIES

Please bring with you to our meeting documentation relating to the deceased's liabilities which may include the following:-

- Income Tax Liability
- Funeral Account
- Mortgages
- Other debts (eg. credit cards, utilities, council tax, service charge, store cards)

OTHER

It is essential to ensure that any valuables are made secure as well as the property. You will need to notify the buildings and contents insurance companies if the property is empty and an additional premium may be payable. Please provide details if you would like us to arrange this for you.

Please also forward the deceased's passport and we will arrange for cancellation. Do you wish us to return the passport to you after cancellation?

Please use this section to tell us about any other information that is necessary or use this as a continuation sheet.

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For further advice on probate or will matters please contact privateclient@gregsons.co.uk or telephone our private client department on 020 8879 4442. It is essential to take specific professional advice before taking any action.