



PROBATE INFORMATION FORM

The following information is required from you to enable us to deal with the deceased's estate:-

Executors details

- ▣ names, addresses, e-mail addresses, telephone numbers;
- ▣ relationship to the deceased.

Deceased details

- ▣ names (including alias names) and last address;
- ▣ is there a Will?
- ▣ If so, what is the location of Will and other testamentary papers e.g. memorandum of wishes;
- ▣ dates of birth and death
- ▣ death certificate, if this has already been obtained
- ▣ personal status – married, bachelor, spinster, divorced (single), widowed – obtain marriage certificate, spouse's will and grant of probate/administration and original or certified copy of decree absolute of divorce/nullity;
- ▣ next of kin (including dependants);
- ▣ funeral arrangements – burial/cremation.

Asset details

- ▣ stocks and shares;
- ▣ bank accounts;
- ▣ National Savings Bank, building and friendly or co-operative society accounts;
- ▣ premium bonds and National Savings certificates;
- ▣ unit trusts, bonds and other investment accounts (PEPs, Tassas, etc);
- ▣ insurance policies;
- ▣ cash in hand;
- ▣ jewellery and antiques;
- ▣ other chattels;
- ▣ rent;
- ▣ arrears of salary/pension;
- ▣ real estate (including leaseholds) – location and title deeds.

Debt details

- ▣ mortgage;
- ▣ gas, electricity, telephone;
- ▣ water rates, council tax;
- ▣ credit cards;



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- ▣ loans;
- ▣ other.

Other details

- ▣ accountant;
- ▣ stockbroker;
- ▣ solicitor who prepared Will (if not Milwyn Jenkins & Jenkins);
- ▣ tax district and reference/National Insurance number;
- ▣ property insurance – home, contents, car, *etc*;
- ▣ gifts made within the last seven years of death:
 - (a) description and date;
 - (b) donee (name and address);
 - (c) amount or value of gift;
- ▣ beneficiaries – names and addresses.