

PROBATE QUESTIONNAIRE

Documents we will need

- Death certificate
- Original will (if applicable)
- Deeds to property (if applicable)

Details of the deceased

Full name: (Mr/Mrs/Miss/Ms)	
Any other names known by:	
Address:	
Date and place of birth:	
Date of death:	
Marital status:	
National Insurance no:	Tax reference:
Surviving relatives:	

Personal representatives/executors

1	Name:	
	Address:	
	Email:	
	Telephone number:	
2	Name:	
	Address:	
	Email:	
	Telephone number:	
3	Name:	
	Address:	
	Email:	
	Telephone number:	

Assets

Please tick to show whether the asset is jointly owned or in the deceased's sole name. Please expand any details on a separate sheet of paper where necessary.

	Description	Sole	Joint	Value
Residence				
Other land or property				
Any property or assets overseas				
Cars, boats & other vehicles				
Valuable household & personal goods (eg. jewellery)				
Bank & building society accounts				
Cash				
Stocks & shares				
National Savings and Premium Bonds				
Life insurance policies				

	Description	Sole	Joint	Value
Debts owed to the deceased				
Death in service benefits & pensions				
Business assets				
Other				

Liabilities

Funeral bill	
Mortgages	
Credit cards & loans	
Utility bills	
Any other creditors	

Beneficiaries

Names, ages and up to date contact details:

Gifts

If the deceased made any gifts of over £250 in the last 7 years then please provide details of those gifts and the beneficiaries.

Trusts

Was the deceased a beneficiary of a trust or did they ever give up any right to benefit under a trust?

Any other information that may be relevant: