



## PROBATE QUESTIONNAIRE

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STRICTLY PRIVATE AND CONFIDENTIAL

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# SECTION A – IMPORTANT NOTES

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## **PART A. Personal Details**

1. The questionnaire is intended for use for a number of wide ranging circumstances. You may find some questions inappropriate to your particular circumstances, but please complete all relevant sections. The more information you provide now the easier it will be for us to complete matters on your behalf.
2. If you do not understand any of the information included in this Probate questionnaire please contact us using our contact details supplied on the front page.
3. If you do not have the information requested or you are not sure regarding the accuracy of the information please send us either the original or copy documents relating to the information, such as old bank statements, general correspondence, building society books, pension books, old p60 forms or tax returns, social security details etc to allow us to contact the relevant bodies so as to ascertain the exact accurate information required.
4. Please use the space below to provide any information which you feel may be relevant in the administration of the estate.

# SECTION B – PERSONAL DETAILS

## PART A. Personal Details

Full Name: (Please also list any other names you are known by)

Last known permanent address: (Please confirm whether this address is a care home)

Date of Death:

Date of Birth:

Occupation:

NI Number:

Income Tax District:

Income Tax District:  
self assessment reference

Marital Status:

Single       Widowed       Divorced       Married

Was the deceased domiciled in England/Wales?       Yes       No

If no, where was he/she domiciled?

Did the deceased grant a power of attorney?       Yes       No

If no, where are you domiciled?

## PART B. Deceased Asset Information

Did the deceased make any gifts within the last 14 years?       Yes       No

If you answered YES please give further details

To Whom	Value of Gift	Date of Gift
<input type="text"/>	<input type="text"/>	<input type="text"/>

Did the deceased hold any assets in joint names?

Yes

No

Joint Asset details

Details of each joint asset	Value of each asset	Liabilities	Deceased's share

Did the deceased, at any time during their lifetime give written instructions that any asset was to pass to a particular person on their death?

Yes

No

If you answered YES please give further details

Asset	Nominee details

Did the deceased have any right to any benefit from any assets held in trust or in a settlement at the date of death?

Yes

No

If you answered YES please give further details

Details of trust / Settlement	Value

Did the deceased have provision for a pension from employers, a personal pension policy or other provisions made for retirement other than the State Pension?

Yes

No

If you answered YES please give further details

Name and address of pension provider	Value of pension fund

Did the deceased own any bank accounts, stocks or shares?

Yes

No

Name of bank, building society company and type of shares or stock or full name of units trust and type of units	Number held

Did the deceased lend any money either on mortgage or by personal loan that had not been repaid by the date of death?

Yes

No

If you answered YES please give further details

Detailers of provider	Outstanding amount of loan to be repaid

Did the deceased pay any premiums on any life insurance policies or annuities which are payable to either the estate or to someone else or which continue after death?

Yes

No

If you answered YES please give further details

Name and address of insurance providers	Is the policy payable to the estate or to a nominated other	Value of policy

Did the deceased own any household goods or other person possessions?

Yes

No

If you answered YES please give further details

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Did the deceased have a right to a legacy or a share of an estate of someone who died before them, but which they had not received before they died?  Yes  No

If you answered YES please give further details

Value of legacy	Details of deceased leaving legacy

Did the deceased own any land or buildings in the UK?  Yes  No

If you answered YES please give further details

Full address	Post Code	Tenure	Lettings/leases	Open Market Value

Did the deceased own any farm or agricultural land?  Yes  No

If you answered YES please give further details

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Did the deceased own all or part of a business or were they a partner in a business?  Yes  No

If you answered YES please give further details

Business name and address	Company number	Type of business	Extent of deceased interest in the business	Deceased estimated interest in the business

Did the deceased own any assets outside the UK?

Yes

No

If you answered YES please give further details

**PART C. Deceased Family Details**

Did the deceased leave a Will?

Yes

No

Please give full details of the following Surviving Relatives:

Spouse     Brother/Sister     Mother     Father

Number Of Children:

Number of Grandchildren:

If you answered YES please give further details

	Full Name(s)	Address	Age/Date of Birth
Mother			
Father			
Spouse			
Brother			
Sister			

	Child's Full Name(s) (or other dependent)	Age/Date of Birth	No of their children (Your Grandchildren)	Please advise if Adopted/ Stepchild/ Illegitimate
1				
2				
3				
4				
5				
6				
7				

## SECTION C – YOUR PERSONAL DETAILS

### PART D. Personal Details

Full Name: (Please also list any other names you are known by)

Home Address: (We will write to you at this address unless you specify a different address for correspondence)

Home Tel No:

Work Tel No:

Mobile Tel No: