

Probate Questionnaire

Documents we will need

- Death certificates
- Original Will (if applicable)
- Deeds to the property (if applicable)

Details of the deceased:

Title (Mr/Mrs/Ms/Dr etc.)	
Full name (including middle names and any other names known by)	
Address	
Date and place of birth	
Date of death	
Marital status	
National Insurance number	
Tax reference number	
Surviving relatives	

Personal representatives/executors

1	Title (Mr/Mrs/Ms/Dr etc.)	
	Full name	
	Address	
	Telephone number	
	Email address	
	Date of birth	
	National Insurance number	
2	Title (Mr/Mrs/Ms/Dr etc.)	
	Full name	
	Address	
	Telephone number	
	Email address	
	Date of birth	
	National Insurance number	
3	Title (Mr/Mrs/Ms/Dr etc.)	
	Full name	
	Address	
	Telephone number	
	Email address	
	Date of birth	
	National Insurance number	

Assets:

Please mark 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				

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 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