

A background image showing a pair of hands sorting through a box filled with various documents and papers, overlaid with a teal tint.

The Probate Checklist

Why the checklist is important?

Before your telephone appointment with your solicitor, we ask you to review the following checklist. Having this information to hand will ensure you make the best use of your free 20 minute consultation, and will enable your solicitor to provide an accurate assessment of the complexity, cost and timescales associated with the administration of the estate.

Your Probate Checklist

The Executor or Personal Representative

We will need to talk to the person (s) who has the right to administer the estate. This will either be the Executor (s) named in the Will or, in the absence of a Will, the administrator named under the intestacy rules.

If you are uncertain who is responsible for administering the estate, we can discuss this during your free 20 minute consultation.

Finances

Where applicable, please have details of the deceased person's

- Bank accounts
- Building Society accounts
- Savings accounts
- Mortgage or loan accounts
- Credit Cards
- Cash
- Stocks and Shares
- Other investments

You will need an approximate value of each of the assets and / or debts. If you are aware of accounts or suspect that other accounts exist but are unable to locate the paperwork, we can discuss this during your free 20 minute consultation.

Income

Please provide details of any income the deceased was receiving prior to their death, such as pensions, salary or benefits.

Property

Give details of any property / properties owned by the deceased, along with their approximate value. If possible, supply information on how the property / properties were owned, such as sole or joint ownership.

Possessions

List any possessions held by the deceased, with an approximate value. This should include vehicles, jewellery, artwork or antiques, as well as other valuables, furniture and other personal possessions.

Beneficiaries

If a valid Will exists, the beneficiaries will be named in it. In the absence of a valid Will, the beneficiaries will be decided by the rules of intestacy. Your solicitor will need to know if you are able to make contact with each of the beneficiaries.

If you are not sure who the beneficiaries are, or are unable to contact them, this can be discussed during your free 20-minute consultation.

Complicated estates

Do any of the following apply?

If you are not certain if any of the following apply this can be discussed during your free 20 minute consultation.

- Are there doubts over the validity of the Will?
- Did the deceased leave dependants who may have a claim for support but have been left out of the Will?
- Does the estate include arrangements such as assets held in trust?
- Is the estate insolvent, or are there doubts about the solvency of the estate?
- Does the estate include foreign property?
- Was the deceased domiciled outside the UK?

What's been done to date?

Sometimes people start the probate process and contact a solicitor when they realise it is more complicated or time consuming than they initially envisaged. In these circumstances your solicitor will need to know how far through the process you are. You should tell your solicitor if any of the following tasks have already been completed.

- The death has been registered with asset and liability holders, and any other providers of accounts held in the deceased's name have been informed, e.g. utilities, insurance, pensions.
- Where inheritance tax is payable, the Inheritance Tax Account has been submitted to HMRC.
- Application has been sent to the Probate Registry
- The grant of representation has been issued
- A bank account has been opened on behalf of the estate
- A statutory advertisement has been placed
- Funds have been requested from asset holders

Next Steps

Once you have reviewed the checklist you can book your appointment by visiting:

www.the-probate-network.co.uk/book-now/

If you have any questions about the checklist please email contact@the-probate-network.co.uk