

Grant of Probate Questionnaire

To help us deal with your instructions as efficiently as possible, please complete this form as fully as you can. There is space at the end the form for 'Additional Information' which you can use to provide us further information or to include more details if there is not enough space in any section of the form (if so, please indicate the question to which the further information relates).

We recognise that the form is detailed, but such information is required to ensure that we fully understand and comply with your wishes. If, however, you are unable to answer any of the questions do not worry, simply complete the form in as much detail as possible and a member of our Team will contact you to discuss your case in further detail.

You can save this file at any time and return to it later (your data will not be lost).

Once completed, please return the form to us by clicking on the "submit form" button at the top of this page. Alternatively, you can save the file and then attach it to an email (send your email to privateclient@gabb.co.uk).

Thank you

Section A: Your Personal Details

Title (Mr/Mrs/Miss/Ms/Other)

Full name

Address

Telephone

Email

Relationship to the deceased

Section B: Details of the deceased

Name of deceased
as shown on death Certificate

Any other names known as

Last address of the deceased

Date of birth

Date of death

National Insurance No

Tax reference (if known)

Occupation

Section C: Details of the family

Is there a surviving spouse/civil partner?

Full name of surviving spouse/civil partner

If there is no surviving spouse/civil partner
was the deceased a widow/widower?

Was the deceased divorced

If applicable, date of divorce

Was the deceased living with a partner

If yes, please supply name, address
and number of years lived together

Details of any children of the deceased

Child one

Full name

Address

Date of Birth

Child two

Full name

Address

Date of Birth

Child three

Full name

Address

Date of Birth

Child three

Full name

Address

Date of Birth

Was there anyone who was financially dependent
on the deceased at the date of death?

If yes, please supply their details

Section D: The Will

Is there a Will?

(If no please do not fill in this section and go to section E on page 6)

If yes date of Will

Is the deceased's address the same as the one on the death certificate

If no, give address on Will and details of what happened to the property

Has the Will been signed?

Has the Will been dated?

Witnessed by two people?

Has it been tampered with?
(eg any alterations)

Did the deceased either marry or divorce after the Will was made?

Does the Will ignore people who you would expect to be mentioned (eg any of those mentioned in family details?)

Does the Will create any trust?

Please confirm that the deceased was domiciled in England or Wales (i.e. this was their permanent place of residence)

Details of all named Executors

Executor one

Full name

Address

Telephone

Relationship to the deceased

Are they still alive and able to act?

Executor two

Full name

Address

Telephone

Relationship to the deceased

Are they still alive and able to act?

Executor three

Full name

Address

Telephone

Relationship to the deceased

Are they still alive and able to act?

Executor four

Full name

Address

Telephone

Relationship to the deceased

Are they still alive and able to act?

Section E: Details of the Estate

What is the approximate value of the deceased's house?

Did the deceased own this house with anyone else?

If yes, who did they own it with?

If the deceased did not own the property in which they lived when they died, had they owned it at anytime previously?

Did the deceased own any assets jointly? (e.g joint bank account)

Who was the other joint owner?

If yes, approximate value of their share (this must be added to the gross assets)

Approximate value of all remaining assets held in the deceased's sole name eg. Bank accounts, bonds, shares

Was the deceased owed any money e.g from a friend or family member? (If yes please supply details of the amount and who owes the money)

Approximate value of the deceased's household belongings incl. cars, motorbikes etc

Did the deceased own any foreign property?

Did the deceased own any agricultural property?

Did the deceased run a business?

Name of funeral director

Funeral director costs

Other debts owed by the Deceased (approximate amount)

Did the deceased make any gifts during the past seven years?

Did the deceased benefit from any asset held in trust?

Section F: Additional Information

Please provide any additional information that you think may be relevant

Would you like any further information on:

Mitigating the cost of Nursing homes

Saving inheritance tax

Lasting Powers of Attorney

Wills

We would like to send you a brochure which provides information on the full range of services offered by our firm.

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