

CHECKLIST FOR APPLICANTS

This checklist may help you remember what to bring to Court. It will help us complete the application form, but it is not essential.

Details of deceased (Please bring death certificate)			
Name (Full name, not initials)			
Address:			
Occupation:			
Place of death:			
Date of death:			
Details of executor(s)			
Full name of the executor/s			
Full address of the executor/s			
Details of the will, relatives, etc.			
Did the deceased leave a Will?	Yes	No	(Delete as applicable)
If Yes, please bring the original Will and any other relevant papers			
If No, please answer the following questions:			
At time of death, was the deceased: (Delete as applicable)	Single	Married	Civil Partner
	Widowed	Divorced	Dissolved Civil Partner
How many children survived the deceased?			
Did the deceased have any brothers or sisters who are alive?			
Was the deceased's Father dead?			
Was the deceased's Mother dead?			

Details of the Estate - Wherever situated
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Please bring bank books, building society pass books, insurance policies and any other relevant documents **with all interest and bonuses marked up to the date of death**

Did the deceased leave any heritable property (such as a house or land) ?

Yes

No

(Delete as applicable)

If yes, please give full details and value.

Cash in the deceased's possession or in the house

Furniture and Personal Effects (estimated value)

Money in banks, building societies etc.

Insert the name of bank, account number and full amount including interest to the date of death

Name and address of Bank/Building Society	Account reference No	Amount

Insurance policies

Insert the name of the company and the policy number with the value including any bonuses

Name and address of insurance company	Policy number	Value of policy plus interest /bonuses

Any other item of estate.

Give details of any other item of estate left by or due to the deceased that is not covered elsewhere, such as wages, superannuation, old age pension, Premium Bonds, savings certificates, shares.

Gifts and income from a Trust.

Did the deceased make any gift over £250 within seven years of death or receive any income from a Trust?

If yes, please give details.