

CHECKLIST FOR APPLICANTS

This checklist may help you to prepare for coming to Court. It will help us complete the application form, but its completion is not essential.

Details of deceased (N.B. You must bring the death certificate with you)			
Name (Full name, not initials)			
Address:			
Occupation:			
Place of death:			
Date of death:			
Details of executor(s) (N.B. You must bring identification with you – see appendix for details of acceptable forms of identification)			
Full name of the executor(s)			
Full address(es) of the executor(s)			
Details of the Will, relatives, etc.			
Did the deceased leave a Will?	Yes	No	(Delete as appropriate)
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 appropriate)	Single	Married	Civil Partner
	Widowed	Divorced	Dissolved Civil Partner
How many children survived the deceased?			
Was the deceased survived by any brothers or sisters who are alive?			
Did the deceased's Father	Yes	No	(Delete as

survive the deceased?			appropriate)
Did the deceased's Mother survive the deceased?	Yes	No	(Delete as appropriate)

Details of the Estate - Wherever situated			
Heritable Property 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.

Before attending the Court, please obtain from the bank / building society the final balance in the account(s) including details of all **interest and bonuses due up to the date of death**. Please bring bank books / statements, building society pass books, and any other relevant documents with you to the interview.

Insert in the table below the name of bank / building society, account number and full amount including interest to the date of death.

Name and address of Bank/Building Society	Account number	Balance

Insurance policies

Before attending the Court, please obtain from the insurance company the final amount due including details of all **bonuses due up to the date of death**. Please bring the insurance policies and any other relevant documents with you to the interview.

Insert in the table below 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 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.

Evidence of identity of executor

When attending the court you must bring with you evidence of your identity.

Two documents are required.

Acceptable forms of identity include:

- A government-issued document which incorporates your full name and photograph, and either your residential address, or your date of birth, i.e.
 - a valid passport,
 - a valid photocard driving licence (full or provisional),
 - a National Identity card (non-UK nationals),
 - a Firearms certificate or shotgun licence, or
 - an Identity card issued by the Electoral Office for Northern Ireland.

- A government-issued document (without a photograph) which incorporates your full name, and either your residential address, or your date of birth, i.e.
 - a valid (old style) full UK driving licence, or
 - recent evidence of entitlement to a state or local authority funded benefit including housing benefit, council tax benefit, tax credit, pension, educational or other grant.

- Other documents such as
 - a current council tax demand letter, or statement,
 - current bank statements, or credit/debit card statements (but not ones printed off the internet), or
 - recent utility bills (but not ones printed off the internet).

If you are unable to provide two forms of identification from the above list, you should telephone the sheriff clerk's office prior to attending, to discuss what alternative forms of identification would be acceptable.

If you are not attending the court personally, but rather submitting the application by post, then three pieces of documentary evidence are required.