pavilionrow

Your full name

Address

Preferred day time contact number

Email address

Full name of the person who has died

Your relationship to the person who has died

Probate Questionnaire

Private and Confidential

0114 2999 584

www.pavilionrow.com

probate@pavilionrow.com

Using Pavilion Row's Probate Questionnaire

This form is designed as an aid for people who have been given the responsibility of administering a person's estate, i.e. an executor.

The first thing to do when administering any estate is to understand what needs to be done and collate all the relevant information. This form is designed to help you with this.

Once you have all the information together you will be able to identify who needs to be contacted e.g. third party asset holders and what tax forms need to be completed.

In addition, by completing the form, it will enable you to evaluate the amount of work involved and whether you have the time and/or feel comfortable undertaking the full administration yourself or if you would prefer to pass this responsibility to somebody else.

Using a Professional

The role of an executor can be a large responsibility and very time consuming. It is also something very few of us have any experience in. Therefore, if you choose to use a professional who deals with this work on a daily basis it often results in the administration being done quicker and more cost effectively.

You can refer to our Executor Pack to find out more about your roles and responsibilities as an executor and what to expect if you use a professional.

If you are considering the option of using a professional we also suggest that you use this form to get a no obligation quote from us. Once you have received the quote you will then be able to make an informed decision as to what is the most suitable option for you, as the executor, and for the beneficiaries.

Note: if you thinking about using a professional it's advisable NOT to start any of the work, beyond completing this form, at this stage as this may lead to duplication of effort and possible extra costs.

Receiving a quote from us

If you would like a quote please fill in this form to the best of your knowledge. Don't worry if you are not sure about some of the questions and please use section 5 if you feel there is anything else important that we should be aware of. Once complete, please return the form to;

Probate Administration
Pavilion Row Ltd
Renishaw Business Park
40 Ravenshorn Way
Renishaw
Sheffield, S21 3WY

Or email probate@pavilionrow.com and ensure that the declaration on page 10 is signed and dated.

Once we have received the form we will review it and, based on the information, provide you with a no obligation quote for undertaking the work.

Note: if you would like an electronic version of this form please email us on the above address.

Section 1a: The Will

Did the person who has died leave a Will? Y N
If 'Yes' please provide a copy of the Will.

Are there any codicils? Y N

Are all of the executors able and willing to act? Y N
If 'No' please give details:

Please provide contact details of all other executors:

Name	Email	Tel. number

Can you confirm that all the details in the Will are still relevant? Y N
(e.g. gifts are still owned, beneficiaries have not passed away)
If 'No' please give details:

Do you hold the original will? Y N

With Pavilion Row? Y N

With another Solicitor? Y N

Section 1b: About the person who has died

Were they born in England or Wales? Y N

If 'No' please state where they were born:

Did they have their permanent home in England or Wales? Y N

If 'No' please state where their permanent home was:

National Insurance Number:

Tax Reference Number (If applicable):

Were they? Single Married Civil Partner Divorced Widowed

If widowed:

Please provide spouse name:

Date of marriage/civil partnership:

Date of spouse death:

Did their spouse/partner leave everything to them? Y N

In the last seven years did they make any gifts totalling more than £3,000 in any one year? Y N

If 'Yes' please give details: (Extra space on page 8)

Gift	To whom	When

Did they have a registered LPA or EPA? Y N

Was anybody acting as their court appointed deputy? Y N

If 'Yes' to either of the above two questions please include a copy of the LPA, EPA or Court Order with this questionnaire.

Section 2: Assets

This section deals with UK assets only there is a separate section for any foreign assets. If you require additional space for your answers please use section 3a. Please note that at this stage only approximate figures are required. We will request policy/plan/account numbers once terms have been signed. The form of ownership abbreviations are:

S = Sole owner J = Joint owner T = Tenants in Common DK = Don't know

Section 2a: Property

Main residence address:

Form of ownership S J T DK | Approximate value: £ | Mortgage value: (if known) £ | Lender name: (if known)

Second property address:

Form of ownership S J T DK | Approximate value: £ | Mortgage value: (if known) £ | Lender name: (if known)

Third property address:

Form of ownership S J T DK | Approximate value: £ | Mortgage value: (if known) £ | Lender name: (if known)

Section 2b: Savings and Investments

Individual Savings Accounts (ISA): | How many? | Approximate value: £

Bank/Building Society name: | Form of ownership S J DK | Approximate value: £

Bank/Building Society name: | Form of ownership S J DK | Approximate value: £

Bank/Building Society name: | Form of ownership S J DK | Approximate value: £

Bank/Building Society name: | Form of ownership S J DK | Approximate value: £

Life Cover? Y N | If Yes how owned? S J DK

How many polices? | Which provider?

National Savings and Investments (NS&I): | How many products? | Approximate value: £

Number of holding in stocks and shares: | Held within ISA wrapper? Y N Both DK

State pension? Y N | Occupational pension? Y N | Number: | Which provider?

Annuities? Y N | Widow's pension? Y N | Number: | Which provider?

Section 2c: Business or Agricultural Assets

If the person who has died had any business or agricultural assets we will need to speak to you to obtain more information. This includes shares in unquoted companies and involvement in any partnerships. Please briefly outline these assets and their main activity:

Section 2d: Foreign Assets

Did they have a foreign Will? Y N

Foreign property:

Where is it situated?

Form of ownership S J T DK

Approximate value: £

Mortgage value: (if known) £

Lender name: (if known)

Foreign Bank name:

How many A/C?

Form of ownership S J DK

Approximate value: £

Foreign Investments? Y N

Approximate value: £

Provider? (If known)

Section 2e: Personal Items

In this section please give a brief description of any items of specific value not already stated in the Will e.g. jewellery, artwork, antiques.

Section 2f: Debts Due

Are you aware of any money **owed to** the person who has died? Y N

If 'Yes' please give details:

Section 2g: Trusts

If the person who has died had any involvements with Trusts we may need to speak to you to obtain more information.

Have they created any Trusts?	Y	N	DK
Were they the beneficiary of any Trust?	Y	N	DK
Had they given up the right to benefit from a Trust?	Y	N	DK
Did they have any assets written under Trust? (e.g. bond/pension)	Y	N	DK

Section 2h: Interest in Other Estates

Was the person who has died in the process of inheriting from another estate?	Y	N	DK
Were they acting as an executor of another estate?	Y	N	DK
Did they inherit from another estate in which Inheritance Tax was paid within the last five years?	Y	N	DK

If 'Yes' please give details in Section 5: Other information

Section 3: Liabilities

This section depicts the financial obligations of the person who has died.

Is a pre-paid funeral plan in place? Y N DK

Please tick all that apply:

Funeral expenses	☐	Is a pre-paid funeral plan in place? Y N
Credit card	☐	How many:
Care fees	☐	
Lease agreement	☐	Details:
Hire purchase agreement	☐	Details:
Other	☐	Approx amount and to whom:
Other	☐	Approx amount and to whom:
Utilities	☐	Have the utility companies been informed of the death? Y N

Are you aware of any other money **owed by** the person who has died? Y N DK

If 'Yes' please give details:

Section 4: Additional Space

Please continue here if you have more detail to provide regarding any of the questions on the form:

Section 5: Other Information

Is there anything else you wish to tell us or that you think might be important? Please include brief details of any contentious family issues or any specific concerns, particularly where there is a need to address them urgently:

Section 6: Declaration

This section must be completed to enable us to provide you with a quote.

I confirm that all of the information provided on this form is true and correct to the best of my knowledge. I understand that this information will be reviewed by Pavilion Row in order to provide a quote for undertaking a full estate administration service. Any quotation is based solely on the information provided and any subsequent changes may incur an additional fee.

I confirm that I understand a representative from Pavilion Row will contact me to confirm details and/or seek further clarification and offer further advice, where appropriate, in relation to any specific circumstances.

Nothing in this form or the subsequent quotation constitutes a binding contract for services by either party.

Alongside the form, I have also included copies of the following documents:

- ☐ Death Certificate
- ☐ Copy Will
- ☐ EPA, LPA or Court Order
- ☐ Copy Codicil
- ☐ Others, please give details:

If the questionnaire is being completed with a financial adviser:

I confirm that I consent for Pavilion Row to discuss the content of this form with, and request information from _____ for the purpose of providing a quote.

Your Signature: _____ Date: _____