

Estate Form



Re:
Account No.

Your details

Full name	
Relationship to the deceased	
Address	
Telephone	
Email	

Are you the personal representative of the deceased? Yes No

Are you named in the will as the executor? Yes No

Are you acting as the administrator in the absence of an executor? Yes No

If you are not the personal representative of the deceased, please confirm who is administering the estate? This may be a relative, friend or firm of solicitors.

Their details

Full name	
Relationship to the deceased	
Address	
Telephone	
Email	

The estate

Did the deceased own the property they lived in? Yes No

If yes, has the property been sold? Yes No

What is the approximate value of the estate? £.....

Are there sufficient funds in the estate to clear all debts? Yes No

(If no, please supply copies of the closing statements for all bank/building society accounts, details of all outstanding debts and a copy of the invoice from the funeral director)

Is there a will? Yes No

Have grant of probate or letters of administration been applied for? Yes No

On what date was probate granted, or is it expected to be granted?

Additional comments

Please use this space to inform us of anything else you think we should know.

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Declaration

I declare that the information provided is a true and accurate reflection of the facts. I understand that the information provided will be verified for accuracy and for the prevention and detection of fraud.

Signed

Print name

Date