

<p>7. Country of domicile or permanent residence (and of spouse/civil partner if different from deceased)</p>	<p>Deceased:</p>	
<p>8. (a) Surviving relatives:</p> <p>Spouse/civil partner (name)</p> <p>Parent(s) (name(s))</p> <p>Number of Brother(s)/ Sister(s)</p> <p>Number of children</p> <p>Number of Grandchildren</p> <p>(b) Was anyone supported or maintained by the deceased at the time of his/her death (e.g. children and, or a partner or former spouse)?</p> <p>If "yes" please give details</p>	<p>Yes</p>	<p>No</p>
<p>9. (a) Income tax district and reference</p> <p>(b) NI number</p>		

INFORMATION RELATING TO THE WILL

11. Did the deceased leave a Will?	Yes*	No*
12. Will enclosed and any Codicils and any letters of wishes? If "no", please give location	Yes*	No*
13. Full name(s) and current addresses of Executor/s		
14. (a) Current addresses of beneficiaries (<i>if different from Will</i>) (b) Has any beneficiary changed their surname since the Will was prepared? If "yes", please give details.	Yes*	No*

<p>15. Full names and date of birth of any beneficiaries under the age of 18 and details of their parent or guardian</p>	
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DETAILS OF THE ESTATE OF THE DECEASED

<p>16. Cash – estimate of loose cash and how disposed of</p>	
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<p>17. Bank accounts</p> <p>And name(s) of any joint holders</p> <p>Address of bank(s)</p> <p>(State whether current, deposit or joint)</p> <p>Bank statements/books enclosed?</p>	<p>Yes*</p> <p>No*</p>
<p>18. Savings Bank account</p> <p>Savings book enclosed?</p>	<p>Yes*</p> <p>No*</p>
<p>19. Building society account/s</p> <p>Passbook enclosed?</p>	<p>Yes*</p> <p>No*</p>
<p>20. Co-operative, friendly society account/s</p> <p>Passbook enclosed?</p>	<p>Yes*</p> <p>No*</p>

<p>21. Securities, quoted and unquoted shares.</p> <p>List (if available) or certificates enclosed?</p> <p>If "no" please give location</p>	<p>Yes*</p> <p>No*</p>
<p>22. National Savings Certificates</p> <p>Certificates enclosed?</p>	<p>Yes*</p> <p>No*</p>
<p>23. Premium Bonds</p> <p>Enclosed?</p>	<p>Yes*</p> <p>No*</p>
<p>24. Freehold, timeshare or other leasehold property</p> <p>(a) Address and open market value. Please supply copies of at least 2 valuations</p>	

<p>(b) Names of joint owners (if applicable)</p> <p>(c) Details of insurers and policy number(s)</p> <p>(d) Have the insurers been notified of the death?</p> <p>(e) Is the insurance cover adequate?</p> <p>(f) Deeds enclosed? (if "no" please give location)</p>	<p>Yes* No*</p> <p>Yes* No*</p> <p>Yes* No*</p>
<p>25. (a) Details of household goods and personal possessions (jewellery, furniture, etc.) with an estimate of open market value or copy valuations, if available.</p> <p>Indicate items in a holiday home or timeshare separately</p> <p>(b) Details of insurers and policy numbers</p>	

<p>(c) Have insurers been notified of the death?</p> <p>(d) Is the insurance cover adequate?:</p> <p>(e) Have any items of value been removed? (If "yes" please give details)</p> <p>(f) If any such goods have already been sold please give gross sale proceeds</p> <p>(g) Details of deceased's car and similar assets such as a caravan or boat.</p> <p>Make and Model</p> <p>Registration number</p> <p>Is this a personalised number?</p> <p>Open market value, including value of personalised number plate if appropriate</p>	<p>Yes*</p> <p>No*</p> <p>Yes*</p> <p>No*</p> <p>Yes*</p> <p>No*</p>
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<p>26. Income and money due to the deceased</p> <p>(a) Salary/fees Name and address of payer</p> <p>(b) State Pension Details</p> <p>Pension Book enclosed? Yes* No*</p> <p>Has a widow/widowers pensions been applied for? Yes* No* Not applicable*</p> <p>Occupational Pension Name and address of payer</p> <p>(c) Rents payable to deceased Name and address of payer</p> <p>(d) Income due from Trusts</p> <p>(e) Payments from private health insurance Schemes</p>	
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<p>(f) Tax repayments due to deceased</p>	
<p>27. Details of policies of assurance payable on death</p> <p>Policies documents enclosed?</p> <p>If not, please give location</p>	<p>Yes* No*</p>
<p>28. Any other money due to deceased</p> <p>(e.g. dividends received but not cashed, uncashed cheques)</p>	
<p>29. Details of business interests</p> <p>Business Interest or partnership share</p> <p>Unquoted shares in a private company</p>	

30. Any other assets (including nominated assets)		
31. Details of any other assets situated outside the UK		
DETAILS OF THE DEBTS OF THE DECEASED		
<p>32. (a) Details of bills outstanding at death (e.g. credit/store cards, utilities bills, council tax, income tax etc)</p> <p>List/bills enclosed?</p> <p>(b) Did the deceased guarantee any loans? (If "yes" please give details)</p>	<p>Yes*</p> <p>Yes*</p>	<p>No*</p> <p>No*</p>

<p>(c) Any other expenses incurred in connection with death (e.g. death announcements, funeral catering)</p> <p>(d) Funeral account enclosed?</p>	<p>Yes*</p> <p>Yes*</p>	<p>No*</p> <p>No*</p>
<p>If "no", please supply name and address of undertaker</p>		
<p>Funeral costs paid, or to be paid from estate funds?</p>	<p>Yes*</p>	<p>No*</p>
<p>33. Mortgage</p> <p>Name and address of building society/other mortgagee and account number</p>		
<p>TRUSTS, GIFTS, ETC</p>		
<p>34. Trusts</p> <p>Particulars of any trust or annuity in which deceased had an interest at or within 7 years of death</p> <p>Solicitors acting for Trustees</p>		

<p>35. Gifts</p> <p>(a) Particulars (date, recipient, details of gift) of gifts exceeding £250 in value to any one person within 7 years of death including any gift for the maintenance of a relative.</p> <p>(b) Details of any substantial gifts made by the deceased (if married) to the surviving spouse during the currency of their marriage (other than usual Christmas, birthday or anniversary gifts, or to a civil partner.</p>	
<p>36. Joint property</p> <p>Details where not already supplied above</p>	
<p>37. Details of legacies received or property inherited within 5 years of death, including right to a legacy or share of an estate of someone who died before deceased where not yet received</p>	

GENERAL			
38.	<p>Did the deceased own a house, flat or other assets jointly with someone who died within five years prior to the death of the deceased?</p> <p>If "yes", give please give details</p>	Yes*	No*
39.	<p>Is a mail redirection to Taylor Walton required?</p>	Yes*	No*
40.	<p>Any other relevant matters not dealt with above?</p> <p>If "yes" please give details.</p>	Yes*	No*
41.	<p>(a) Did the deceased grant a Power of Attorney or Enduring Power of Attorney?</p> <p>(b) Please enclose the original or indicate where it is stored.</p>	Yes*	No*

Completed by:-

Date:-

Name :

Address: