###### **PROBATE INFORMATION FORM**

Please supply thefollowing information preferably typed and emailed to the following email address [***solicitor@GrahamColleySolicitor.com***](mailto:solicitor@GrahamColleySolicitor.com) at least 2 days/48 hours before the meeting.

**Please complete all relevant sections**

**Appointment Date and Time**

|  |  |  |  |
| --- | --- | --- | --- |
| Date : |  | Time : |  |

**Client 1**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Title : |  | | | | Full name: | |  | | | |
|  | | | | | | | | | | |
| Date of Birth : | | |  | | | Date of marriage / *Commencement of cohabitation :* | | | |  |
|  | | | | | | | | | | |
| Address : | |  | | | | | | | | |
|  | |  | | | | | | | | |
| Email: | |  | | | | | | | | |
|  | | | | | | | | | | |
| Phone Number : | | | |  | | | | Mobile: |  | |

**Client 2***(if Applicable)*

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Title : |  | | | | Full name: | |  | | | |
|  | | | | | | | | | | |
| Date of Birth : | | |  | | | Date of marriage / *Commencement of cohabitation :* | | | |  |
|  | | | | | | | | | | |
| Address : | |  | | | | | | | | |
|  | |  | | | | | | | | |
| Email: | |  | | | | | | | | |
|  | | | | | | | | | | |
| Phone Number : | | | |  | | | | Mobile: |  | |

**Deceased Details**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Title : |  | | | | | Full name: | |  | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | |
| Date of Birth : | | | |  | | | | Date of marriage : | | | | |  | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | |
| Address : | |  | | | | | | | | | | | | | Town: | | | |  | | |
|  | | | | | | | | | | | | | | | | | | | | | |
| Post code : | | |  | | | | | National Insurance Number: | | | | | | | | | | |  | | |
|  | | | | | | | | | | | | | |  | | | | | | | |
| Date of Death : | | | | |  | | | | | Age at Death : | | | | | |  | | | |
|  | | | | |  | | | | |  | | | |  | | | | | | | |
| Occupation : | | | | |  | | | | | | | | | | | | | | | | |
|  | | | | | | | | |
| Was the home owned by the deceased? | | | | | | | | | | | | Yes : | | | | |  | No : | |  |  |
|  | | | | | | | | | | | | | | | | | | | | | |
| In sole name or if jointly with whom : | | | | | | | | | | | Sole Name : | | | | | |  | Jointly : | |  |  |
|  | | | | | | |  | | | | | | | | | | | | | | |
| Full name : ( If Jointly ) | | | | | | |  | | | | | | | | | | | | | | |

**Deceased Relatives**

|  |
| --- |
| **Names of Relatives ( Spouse / Children / Grandchildren :** |
|  |

|  |
| --- |
| **Are any Brothers/Sisters/Parents Living :** |
|  |

***(Please see next page for assets and liabilities)***

**Assets and liabilities of the estate**

Please complete with as much detail as you are able:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Details** | **Amount at death** | **Tick if an estimate** |
| **Cash** |  |  |  |
| **money in banks, building societies** |  |  |  |
| **National Savings** |  |  |  |
| **ISAs etc** |  |  |  |
| **Other** |  |  |  |
| **Household and personal goods** |  |  |  |
| **Stocks and shares quoted** |  |  |  |
| **Stocks and shares not quoted on the Stock Exchange** |  |  |  |
| **Insurance policies, and mortgage protection policies** |  |  |  |
| **Money owed to the person who has died** |  |  |  |
| **Partnership and business interests** |  |  |  |
| **Value of home residence** |  |  |  |
| **Other freehold/leasehold residential property** |  |  |  |
| **Other assets forming part of the estate** |  |  |  |
| **Gifts and other lifetime transfers made within 7 years** |  |  |  |
| **Details of Any Joint assets or bank/savings accounts** | Name of joint holder |  |  |
| **Assets held in trust for the benefit of the deceased** |  |  |  |
|  | **Total Assets** | | |
| **Liabilities/Debts of the estate** |  |  |  |
| **Funeral expenses** |  |  |  |
| **Mortgage /Share of mortgage on a joint property** |  |  |  |
| **Other debts** |  |  |  |
|  | **Total Liabilities** |  |  |
|  | **Assets less liabilities** |  |  |