HELPING YOU DEAL WITH AN ESTATE

If you would like us to help you deal with the administration of the estate of someone who has died you should firstly contact us to make an appointment to see Mr Alistair Keeble.

When you call to see him you should bring with you as many of the following as you can: this will help Mr Keeble to give you the fullest possible advice and, if possible, give you a Fixed Price Estimate for the work which you would like us to carry out.

1. Recent bank statements for all bank accounts (including joint accounts) ☐
2. Recent statements and/or Certificates or Passbooks for all Building Society accounts (including joint accounts) ☐
3. Recent statements for any Post Office Card Account into which pensions have been paid ☐
4. National Savings Certificates and/or Bonds ☐
5. Premium Savings Bonds ☐
6. Share Certificates (or a recent Shareholder Statement if there is no Certificate) for any stocks and shares held by the person who has died either in his or her sole name or in joint names ☐
7. Investment Plans or Bonds (including PEPs and ISAs) ☐
8. House and Contents Insurance policies ☐
9. Life Assurance policies ☐
10. Motor vehicle log book(s) ☐
11. Deeds to all properties owned by the person who has died, or, if you do not have these, details of where they may be located ☐
12. A recent statement for any mortgages secured on these properties ☐
13. Keys to any properties if our firm is appointed Executor of the estate, or details of where keys may be obtained ☐
14. The original will of the person who has died – unless we are already holding this for safekeeping ☐
15. At least one original full death certificate (these are the ones which you have to pay for when registering the death) ☐
16. The Notification of Death form to be sent to the Department for Work and Pensions ☐
17. Recent utility bills ☐
18. The Funeral Invoice, if this has been issued yet ☐
19. Any other bills outstanding at the date of death such as Nursing or Care Home fees ☐

Mr Keeble will also ask you for as much of the following information as you can provide:

ABOUT YOU

i. Your name, address and other contact details
ii. Your date of birth
iii. Evidence of your identity to satisfy our obligations under the Money Laundering Regulations
iv. Whether you are an executor named in the will or, if not, your relationship to the person who has died

ABOUT THE PERSON WHO HAS DIED

i. Their name and last address
ii. Their date of birth and date of death
iii. Their National Insurance Number
iv. Their Income Tax reference and Tax Office
v. Whether or not they left a will
vi. Who has the will
vii. What relatives survived them?
    - Husband/Wife/Civil Partner?
    - Children? How many?
    - Grandchildren? How many?
    - Parent(s)?
    - Brothers or Sisters?
viii. Did they make any lifetime gifts? If so of what and when?
ix. Did they carry on a business?
x. Were they engaged in agriculture?
xi. Were they a beneficiary under a trust?

Don’t worry if you cannot provide all or any of the above – we appreciate that this may be a very difficult time for you.

Just come and see us – we are here to help you