



PROBATE ASSIST QUESTIONNAIRE

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PROBATE ASSIST QUESTIONNAIRE

SECTION A ABOUT THE PERSON WHO HAS DIED	
1. Title	Mr/Mrs/Ms/Miss Other (please state)
2. Surname	
3. Full Christian Names	
4. Details of any other names by which the deceased was known	
5. Date of death <i>Please supply a copy of the death certificate</i>	
6. Marital Status <i>If divorced please supply a copy of the decree absolute</i> <i>If widowed please supply a copy of the former spouse's death certificate</i>	MARRIED/DIVORCED/WIDOW WIDOWER/BACHELOR/SPINSTER
7. Occupation	
8. Income tax reference	
9. National Insurance Number	
10. Surviving relatives:-	
10.1 Was the deceased survived by a husband or wife?	YES/NO
10.2 Was the deceased survived by brothers or sisters?	YES/NO
10.3 Was the deceased survived by Parents?	YES/NO
10.4 Number of children	
10.5 Number of grandchildren	

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SECTION B	WILL/NO WILL
<p>1. Did the person who died leave a valid Will at the date of death?</p>	<p>YES/NO</p> <p><i>If yes please send the original Will to us and confirm the addresses of the Executors named in the Will and their willingness to act</i></p> <p><i>If no please complete boxes 2 and 3 below</i></p>
<p>2. Please provide the full name, address and date of birth of the spouse, if any, of the person who has died</p>	
<p>3. Please provide the full names and address and dates of birth of the children, if any, of the person who has died.</p> <p>DO NOT INCLUDE STEP CHILDREN</p> <p>NB If the person who has died not leave a valid Will and was not survived by a spouse and/or children over the age of 18, then stop completing this questionnaire and refer back to us, as this scheme cannot be used in such circumstances</p>	

SECTION C ABOUT THE ESTATE GENERALLY	
1. Within 7 years of the date of death did the deceased:- 1.1 Make any gifts or transfer any property valued at more than £3,000.00 per year other than normal wedding, festive or birthday gifts 1.2 Give up the right to any assets held in trust <i>NB if you answered yes to either 1.1 or 1.2 and the value is more than £150,000.00 stop completing this questionnaire as this scheme will not be applicable to you. If the value is less than £150,000, please state the value below in Section E box 1</i>	YES/NO YES/NO
2. On or after the 18 th March 1986 did the person who has died make a gift where:- 2.1 they continued to benefit from it or had the right to benefit from the property which they gave away? 2.2 The person they gave it to did not have full enjoyment of the gifted property? <i>NB if you answered yes to either 2.1 or 2.2 stop completing this questionnaire as this scheme will not be applicable to you</i>	YES/NO YES/NO
3. Did the person who died have the right to receive any benefit from any assets held in trust? <i>NB if you answered yes and the value is more than £150,000.00 stop completing this questionnaire and call us as this scheme will not be applicable to you. If the value is less than £150,000.00 please state the value in Section E box 2</i>	YES/NO
4. Did the person who died own or benefit from any assets outside of the UK? <i>NB if you answered yes and the value is more than £100,000.00 stop completing this questionnaire as this scheme will not be applicable to you. If the value is less than £100,000.00 please state the value in Section E box 5</i>	YES/NO

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SECTION C ABOUT THE ESTATE GENERALLY	
5. Did the person who has died pay any life insurance premiums that were not on his/her own life or that were not for his/her own benefit and which are not due to his/her estate?	YES/NO
6. Was the person who died a member of a pension scheme or did they have a pension policy from which they had not taken the benefits when they died?	YES/NO
7.1 Was the person who died entitled to receive payment from a pension which continued to be paid to their estate after they had died?	YES/NO
7.2 Was a lump sum payable under a pension scheme or pension policy as a result of death?	YES/NO
8. Within 7 years of death did the person who has died:-	
8.1 Pay any premiums on a life insurance policy under which the benefit is payable other than to the estate or to the spouse of the person who has died?	YES/NO
8.2 Did they buy an annuity at any time?	YES/NO
9. At any time when they were in poor health or terminally ill did the person who has died change their pension scheme or personal pension policy so as to:-	
9.1 Dispose of any of the benefits payable, or	YES/NO
9.2 Make any changes to the benefits to which they were entitled?	YES/NO
<p><i>NB If you have answered yes to any of the questions at 5-9 of this section it is likely that you cannot use this scheme. Please provide all the relevant details on the supplemental sheets that follow and we will advise you on the appropriate course of action</i></p>	

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SECTION D ASSETS IN THE SOLE NAME OF THE PERSON WHO HAS DIED (DO NOT INCLUDE JOINT ASSETS WHICH PASS AUTOMATICALLY TO THE SURVIVING PARTY AS THESE SHOULD BE INCLUDED AT PART E 3)	
Please place total value in right hand column	
1. Cash including money in banks, building societies and National Savings	
2. Household and personal goods (including cars used for non business purposes)	
3. Stocks and shares quoted on the stock exchange (including PEP's and ISA's)	
4. Stocks and Shares not quoted on the stock exchange	
5. Insurance policies	
6. Money owed to the person who has died	
7. Partnership and business interests	
8. Freehold/Leasehold residence of the person who has died (do not include its value here it passes automatically to a surviving owner, include its value at Part E 3 instead)	
9. Any other Freehold/Leasehold property	
10. Other Land and Buildings	
11. Any other assets not included in the above (for instance income tax refunds, council tax refunds, state pension due, investment bonds)	

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SECTION E OTHER ASSETS FORMING PART OF THE ESTATE OF THE PERSON WHO HAS DIED (INCLUDE JOINT ASSETS WHICH PASS AUTOMATICALLY TO THE SURVIVING PARTY)	
Please place total value in right hand column	
<p>1. Gifts and Lifetime transfers made within 7 years of death</p> <p>Please state the date, the amount, the recipients full name and address and the relationship of the recipient to the person who has died</p>	
<p>2. Assets held in trust for the benefit of the person who has died where the value is less than £150,000.00</p> <p>Please give details of the trust and details of any solicitors or accountants involved</p>	
<p>3. Share of joint assets passing automatically to the surviving joint owner</p> <p>Please give the value of the deceased's share and the name and relationship of the joint owner</p>	

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<p>4. Nominated assets (i.e. assets where the person who has died made a written statement directing to where the assets should go. For example a pension scheme or life policy)</p>	
<p>5. Assets outside the UK</p> <p>Please give the value in sterling and the applicable rate of exchange used</p>	

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SECTION F LIABILITIES OF THE ESTATE	
Please place totals in right hand column	
1. Funeral expenses	
2. Mortgage(s) on a property in the sole name of a person who has died	
3. Other debts owed by the person who has died	
4. Debts payable by any assets held in a trust in which the person who died had an interest	
5. Share of any mortgage on any property owned in joint names	
6. Share of any other debts payable out of joint assets	
7. Debts owed to any person outside of the United Kingdom	