

**Coffin Mew Solicitors – Wills, Trusts & Probate
Personal Representatives Questionnaire**

	Please complete details in this column
<p>1. If there is a Will:-</p> <p>(i) please forward it to us by hand or by secure post, taking care not to pin, staple or clip anything to it or mark it in any way.</p> <p>(ii) please give the full and correct names and addresses of all executors named in the Will.</p> <p>(iii) please also give the correct names and addresses of all beneficiaries who will inherit under the Will or confirm that they are correctly stated in the Will. Please give the ages of any beneficiaries under 18.</p>	
<p>2. If there is no Will:-</p> <p>(i) Please give the full name of the husband/wife/registered civil partner of the deceased</p> <p>(ii) Please give full names and dates of birth of all living children</p> <p>(ii) have any children died before the deceased?</p> <p>(iii) if so, did they leave any children?</p> <p>(iv) if there is no husband/wife, child or grandchild, who are the nearest relatives? Please give their correct names, addresses and exact relationship to the deceased.</p>	
<p>3.</p> <p>(i) Please confirm the cause of death</p> <p>(ii) Please forward a death certificate (or copy) as soon as possible</p> <p>(iii) Please inform us if the death is to be referred to the Coroner</p> <p>(iv) Was the death caused wholly or partly by an accident / industrial or work related disease / injuries arising at any time through active military service / a hospital related disease or medical intervention?</p>	

4.	Was the deceased in hospital?	
5.	Was the deceased permanently living in a residential or nursing home?	
6.	<p>(i) Did the deceased have a connection with any country other than England and Wales?</p> <p>(ii) Does the deceased's spouse have a connection with any country other than England and Wales?</p>	
7.	What is the deceased's National Insurance Number, Tax District and Reference?	
8.	<p>Please supply particulars of all assets of the estate whether in the sole name of the deceased or joint names with anyone else and forward all relevant</p> <p>(i) Building Society passbooks,</p> <p>(ii) National Savings Bank Books</p> <p>(iii) Savings Certificates,</p> <p>(iv) Premium Savings Bonds,</p> <p>(v) Stock and Share Certificates.</p> <p>(vi) Bank statements or</p> <p>(vii) other relevant securities.</p> <p>Please forward all books, certificates, bonds etc.</p>	
9.	<p>(i) Did the deceased pay premiums on any life insurance policies whether or not they pay out now?</p> <p>(ii) Will the deceased benefit from a life insurance policy when another person dies?</p> <p>(iii) Was the deceased receiving an annuity from an insurance company?</p> <p>If you have answered "yes" to any of the above, please provide details and send us the policies.</p>	

10.	Please give the address of any properties (land or buildings) belonging to the deceased, whether solely or jointly, and the estimated value of such properties:	
11.	Please give details of any lettings.	
12.	Is any property mortgaged? Please state approximately how much is outstanding and to whom repayments are made.	
13.	Please forward the deeds or state where they are held.	
14.	(i) Please also send us the Insurance Policies for the buildings and contents if the property is vacant (ii) Is the insurance cover adequate?	
15.	Is the property to be sold, transferred or retained in trust?	
16.	Did the deceased own a timeshare?	
17.	(i) Please provide an estimated value of the deceased's furniture, jewellery, household and personal effects, including garden equipment and boats (an estimate of the second-hand sale value is needed in the first instance). (ii) Please list any items of particular value, e.g. antiques, pictures, silver etc. (iii) Are the contents of the property sold or retained?	

<p>18. Did the deceased own a car? If so:</p> <p>(i) What is its make and year and approximate value?</p> <p>(ii) What is to happen to it?</p> <p>(iii) Is it subject to a Hire Purchase or Loan agreement?</p>	
<p>19. Was the deceased receiving any benefits from the Department for Work & Pensions? If there is a payment book, please forward it to us or state where it has been sent. Is anything outstanding?</p>	
<p>20. Did the deceased receive a pension from any other source? Please forward any papers and say whether the deceased made any changes to his/her pension arrangements in the last 2 years.</p>	
<p>21. As a result of the death</p> <p>(i) is there any death in service benefit payable?</p> <p>(ii) is there a lump sum payable from any pension scheme to which the deceased contributed?</p> <p>If so, please give details.</p>	
<p>22. Did he/she regularly employ an Accountant, Estate Agent, Stockbroker or other professional adviser? If so, please give names and addresses and telephone numbers.</p>	
<p>23. Are there any assets not covered by the answers given above, such as:-</p> <p>(i) cash in the house</p> <p>(ii) a share of a business</p> <p>(iii) an interest in someone else's estate or trust or</p> <p>(iv) assets abroad?</p>	

<p>24.</p> <p>(i) Did the deceased owe anyone any money when he/she died;</p> <p>(ii) or was the deceased owed money by anyone?</p>	
<p>25.</p> <p>(i) Please give details of any bills payable from the estate (including doctors' and nurses' fees). If possible please forward all accounts.</p> <p>(ii) Please also state the name of the funeral director and the amount payable, and arrange for the account or receipt to be sent to us.</p>	
<p>26. Did he/she have any credit cards? Please forward them or give names and the appropriate account numbers.</p>	
<p>27. Please send any papers relating to income tax.</p>	
<p>28.</p> <p>(i) Please send any papers relating to Council Tax, Water Rates, Gas, Electricity and Telephone services, and any other household expenses.</p> <p>(ii) What is to happen about the payment of future household bills?</p>	
<p>29. Are there any debts or liabilities not covered by the answers given above?</p>	
<p>30. Since 18th March 1986 has the deceased made any large gifts? {Note: small gifts amounting in total to not more than £250 to any one person, in any tax year may be excluded}. If so, please give full particulars, including names, dates and amounts. Gifts in kind (e.g. a house or flat, stocks and shares, jewellery, furniture) should be included as well as gifts of cash.</p>	

31.	Are you aware of any Settlements or Trusts made by or for the benefit of the deceased on marriage or at any other time? If so, please send us the Deed or a copy.	
32.	Did the deceased have an interest in a Settlement or Trust which ended within 7 years of the date of death?	
33.	Did the deceased inherit anything from another person's estate within 5 years of the date of death?	
34.	Did the deceased have power to nominate anyone to receive any property, securities or money under a Trust or a Will?	
35.	Is there any possibility that the Will may be contested or that a claim will be made against the estate by a relative, a dependant or someone supported financially by the deceased?	
36.	Would it be advisable to arrange for mail to be redirected to Coffin Mew or to some other person?	
37.	Are you aware of any other matter which ought to be disclosed?	

Signed

Dated