

AMES KENT

Est. 1840

Probate Questionnaire

To assist in the preparation of probate, kindly fill out the following questionnaire as comprehensively as you can.

We understand that this form is extensive, but such information is required to ensure we fully understand the estate. If you find any questions challenging to answer, simply provide as much detail as you can and we can discuss it at a later stage.

You have the option to save this file at any point and revisit it later without losing your data.

Once you have completed the form, please return it to us by saving the file and then attaching it to an email before sending it to katherine.oakes@ames-kent.co.uk

Thank you

Section A: Personal

1. Your details

Title

Full Name

Current Address

Email

Telephone (daytime)

Telephone (home)

Occupation

Date of Birth

Country of Residence

Nationality

Status

2. The deceased

Title

Full Name

Current Address

Occupation

Date of Death

Date of Birth

Country of Residence

Nationality

Status

If widowed, did their late spouse's estate pass to them?

Section B: Estate assets

3. Their house

Did they own their property?

If yes, did they own it jointly with another person?

Please give name of co-owner

Is the co-owner still alive?

If owned jointly, is it as

Please give approximate value of the house

Please give approximate value of any mortgage

Please state if mortgage covered by insurance
e.g. life cover or mortgage protection plan

If yes, please give details

**Details of assets, liabilities and
approximate values**

**Indicate whether
in your sole
name or joint
names**

Significant debts

Investments

Bank and building society accounts

Bank and building society accounts (cont.)

National Savings accounts

Life policies/pensions

Business property and interests; shares in
unquoted/family companies

Agricultural property

Foreign property

Did they benefit from any trust assets?

Did they make any lifetime gifts exceeding
£3,000 in any one tax year?

If yes, please give details

If widowed, did their spouse make any lifetime
gifts exceeding £3,000 in any one tax year?

If yes, please give details

Section C: The Will

Did the deceased leave a Will?

If yes, where is the Will?

If no, do you know if the deceased ever
made a Will?

If yes, please give details

If no Will, please provide details of any living spouse, civil partner or nearest blood relatives

Title

Full Name

Current Address

Relationship to the deceased?

Title

Full Name

Current Address

Relationship to the deceased?

Title

Full Name

Current Address

Relationship to the deceased?

4. Executors named in the Will

Executor One

Title

Full Name

Current Address

Relationship to the deceased?

Has confirmed willingness to act as executor?

Executor Two

Title

Full Name

Current Address

Relationship to the deceased?

Has confirmed willingness to act as executor?

Executor Three

Title

Full Name

Current Address

Relationship to the deceased?

Has confirmed willingness to act as executor?

Executor Four

Title

Full Name

Current Address

Relationship to the deceased?

Has confirmed willingness to act as executor?

Date of completion of this form

Completed by

5. Additional Information

NEXT STEPS:

- Save a copy of your completed form
- Attach the form to an email and send to katherine.oakes@ames-kent.co.uk

Thank you.