

AMES KENT

Est. 1840

Probate Questionnaire

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

This form is designed to be completed on a desktop device. If you have a suitable mobile app such as Adobe Reader or similar, then it will be possible to complete and save the form on a mobile device.

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

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 at the date of their death?
If no, go to page 4

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

Agricultural property/land - please give details

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 £

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

Any inheritance received in the last 5 years?

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.