

## Online probate questionnaire

<b>1. Your contact details</b>	
<b>Name:</b>	
<b>Address:</b>	
<b>Email address:</b>	
<b>Contact telephone number:</b>	
<b>2. Date of death:</b>	
<b>3. Did the deceased leave a Will?</b>	<p><b>YES                  NO</b></p> <p>If yes, please go to question 4. If no, please go to question 5.</p>
<p><b>4. If yes, please outline the content of the Will as follows.</b></p> <p><b>How many:</b></p> <ul style="list-style-type: none"> <li>• Executors</li> <li>• Money &amp; specific legacies</li> <li>• Residuary beneficiaries?</li> </ul> <p><b>Does a significant part of the estate pass to a charitable beneficiary?</b></p>	<p><b>YES                  NO</b></p>
<b>5. If no Will, what relation were you to the deceased?</b>	

<p><b>6. Please give an approximate value for the estate assets:</b></p>		
<p><b>7. Did the deceased own any foreign assets?</b></p>	<p>YES</p>	<p>NO</p>
<p><b>8. Did the deceased make any lifetime gifts in the seven years before the deceased died?</b></p>	<p>YES</p>	<p>NO</p>
<p><b>9. Was the deceased a beneficiary of a trust?</b></p>	<p>YES</p>	<p>NO</p>
<p><b>10. Did the deceased leave a surviving spouse?</b></p>	<p>YES</p>	<p>NO</p> <p>If no, please go to question 11.</p>
<p><b>11. If no, did the deceased have a predeceasing spouse?</b></p>	<p>YES</p>	<p>NO</p>
<p><b>12. Which of the following probate services do you want to talk to us about?</b></p> <p style="text-align: center;">Help to obtain the grant of probate</p> <p style="text-align: center;">Assistance with the administration of the estate beyond the grant</p> <p style="text-align: center;">Full estate administration service</p>		
<p><b>13. Additional information:</b></p>		

May 2011