

## QUESTIONNAIRE FOR PERSONAL REPRESENTATIVES

### Part A – About the person who has died

Mr/Mrs/Ms/Other:		Surname:			
First names:					
Other name(s):					
Date of birth:			Date of death:		
Marital status:			Nat Ins number:		
Tax reference			Tax district:		
Last permanent address					
			Postcode		
Place of death:					
			Postcode		
Surviving relatives:	Husband/wife	Yes/No	Name		
	Brothers/sisters	Yes/No:	Number		
	Parent(s):	Mother?	Yes/No:	Father?	Yes/No
	Children:	Yes/No	Number		
	Grandchildren:	Yes/No:	Number		
Domicile:	England & Wales	Or where?			
Occupation:					
Were any powers of attorney granted?	Yes / No – if “Yes”, please supply copy/ies				

### Part B – Will or intestacy?

Is there a Will?	Yes / No	If yes, its date	
Are there any codicils?	Yes/No	If yes, how many?	
Where is the Will (and any codicils?)			

### Part C – Assets

Please answer the following “Yes” or “No” questions and, where the answer is “Yes”, supply details on a separate sheet -

Gifts, etc	Did the deceased make any gifts (apart from routine presents) or transfers of value after 07 March 1986?	
Joint assets	Did the deceased hold any assets in joint names with another person?	
Nominated assets	Did the deceased give instructions that any assets were to pass to a particular person on their death?	
Assets held in trust	Did the deceased, at death, have any right to benefit from a trust or settlement?	
Pensions	Did the deceased have a pension, apart from the state pension?	
Stocks and shares	Did the deceased own any stocks and shares?	
Debts due to the estate	Did the deceased lend any money that had not been repaid by the date of death?	
Life insurance, etc	Did the deceased pay premiums for any life insurance or annuities?	
Personal goods & cars	Did the deceased own any household goods, personal possessions or cars of more than nominal value?	
Other estates	Did the deceased have a right to a legacy or similar from another person’s estate not paid to them by their death?	
Land and buildings	Did the deceased own any land or buildings in the UK?	
Agricultural property	Is any of that land agricultural property?	
Business interests	Did the deceased own all or part of a business, or were they a partner in a business?	
Foreign assets	Did the deceased own any assets outside the UK?	
National Savings	Did the deceased own any National Savings, including Premium Bonds?	
Bank and building society accounts	Did the deceased have any bank or building society accounts?	
ISAs etc	Did the deceased have any ISAs or similar investments?	
Other assets	Did the deceased have any other assets of value at the date of their death?	

### Part D – Debts

Funeral expenses	Please supply a copy of the funeral bill (whether paid or not) or quotation, if there is no bill yet	
Other debts	Please supply details of all debts owed by the deceased at the date of death	