



POWELL
EDDISON
SOLICITORS

Incorporating Davidson Broadbent Solicitors

RAGLAN HOUSE
RAGLAN STREET
HARROGATE
HG1 1LE
DX 11958

Aide Memoire

Questions to ask at the commencement of the Administration

Personal information about the deceased

Title	
Full names	
Alias Names	
Address	
Date of birth	
Date of death	
Occupation	
Marital status and dates If divorced/dissolved needs dates and court	

Family tree information

Spouse/Civil Partner	
Partner/Cohabitee	
Children	
Grandchildren	
Parents	
Siblings	
Grandparents	
Adopted or anyone in family adopted in or out?	

Tax/Domicile info

National insurance number	
Taxpayer/Self assessments etc	
Domicile/Residency	

Will information

Location of original	
Date of Will	
Address in Will same?	
Believed to be last Will? Any previous? Any foreign?	
Any codicils and dates?	
Married or civil partnership post-date of Will/Codicil	
Executors aware of appointment and willing to act?	
Beneficiaries aware of content?	
Any minor beneficiaries? Need ID and parent info	
Likelihood of challenge? By whom? What reason(s)?	

Death certificate

Original received?	
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Funeral Arrangements

Date	
Arranged by whom	
Paid? If so by whom and do they want reimbursing?	
Undertakers	
Funeral account received How much?	

Contacts

Solicitor	
Accountant	
Stockbroker	
Financial advisor	

Investments

i.e. managed portfolios, national savings, unit trusts etc
intention- sell/transfer?

Bank and Building Society Accounts/Cash

Account no's, amounts, joint/sole etc
Intention- sell/transfer?

Cash in property/on person	

Premium bonds/stocks and shares

Holdings, ref no's, amount
Intention- sell/transfer

Life insurance policies

Single/joint Ref Company Paying for the benefit or someone else? Benefiting from someone else's policy?	

Private Health Scheme

Such as simply health

Personal Chattels

Any specific legacies in Will- locate and secure these items

Item/Value	

Debts due to the Deceased

Secured/unsecured/informal?

Refund of overpayments, DWP, HMRC etc.

Property- residential

Address Where are deeds? Registered? Sole or joint? Mortgage? Intention- sell/transfer?	
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Property- buy to let/investment or otherwise

Address Where are deeds? Registered? Sole or joint? Mortgage? Intention- sell/transfer?	

Employment

Employed at death/retired?	
Private pension? Lump sum/ends? Annuity or continuing? Nominated or due to estate? Name and address and ref no	
Death in service payment?	

State pension

Receiving state pension?	
What other benefits in receipt of? Any means tested benefits?	

Money due to estate

Personal injury claims ongoing?	
Inheritance due from another estate?	

Car or other vehicle(s)

Driving licence to be cancelled?	
Refund of road tax	
Refund of insurance	
SORN?	
Intention	
MOT/Service/V5/Keys	
Mileage	
Reg	

Value	
Owned or loaned?	

Business interests

Business	
Sole/Partnership/Ltd etc	
Continuing or key man? Intention	
Value of holdings/what type of shares etc Other assets	
Company documentation	
Other comments	

Trusts

Set up trust? Beneficiary of trust?

Joint Assets

Bank a/c, vehicle, property, business, other

Explain survivorship

Was it really joint or was it for convenience? Who does the money belong to.

Foreign Assets

Asset, value, how held

Other Assets

Lifetime gifting

Details of gifts, gifts over £3,000 in last 7 years? GROB, Gifts after 18th March 1986

Gifts RECEIVED in the last 5 years

Interest in another estate? <i>Name of predecessor</i> <i>DOD of predecessor</i> <i>GOP date</i> <i>IHT reference number</i> <i>Dec'd entitlement</i> <i>Value of entitlement</i>	
Gifts from any other person? <i>Whom gift received from</i> <i>What was the gift</i> <i>Value of gift</i>	

Liabilities

DWP	
HMRC	
Care home?	
Utilities and info Account no's etc If vacant needs draining down turning off at mains etc.	
Council tax Exemption 6 months post grant	
Insurance- NB update vacant Inspection responsibilities	
Credit cards/loans/hire purchase	

Statutory advertisements

Required?	
If execs are us then yes.	
Costs	

Digital assets

Assets and passwords

Lasting Powers of Attorney

To cancel- void for use	
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Practical points

1. Secure valuables
2. Update insurance and inspections
3. Deal with utilities and drain down/turning of mains
4. Clearance
5. Cleaning
6. Valuations

Contact details of executors

Name, address, tel, email, ID needed	

Contact details of beneficiaries

