

**PROBATE QUESTIONNAIRE**

**PART 1 - PERSONAL DETAILS OF THE DECEASED**

Full name	
Date of death	
Domicile at death Domicile of origin	
Confirm if resident or ordinary resident in State at death	
Did the deceased live in the UK during their lifetime and if so please specify the dates. Please provide UK national insurance number.	
Marital status: Single Married Civil Partner Widow/er Divorced (provide Divorce Order) Separated (provide Court Order/Deed of Separation) Qualifying Cohabitee	
Name of spouse/civil partner and date of marriage or civil partnership	
Names of Children, Addresses And state if any are minors	

**PART 2 – PERSONAL REPRESENTATIVES / EXECUTORS**

Full names, addresses, email, telephone number and occupations of executors named in the Will (or personal representatives, if intestate estate)	
Please confirm relationship of Executor/Personal Representative to Deceased	
Do all Executors/Personal Representatives intend to deal with the estate?	

**PART 3 – THE WILL**

Location of Will and any Codicils or Letter of Wishes (if not stored at Gerrard L. McGowan Solicitors)	
Details of any Will(s) in other jurisdictions	
Beneficiaries – please provide a list of addresses for all beneficiaries named in the Will and let us know: (i) if any are deceased. (ii) If any are minors please provide names and addresses of parents/guardians and provide dates of birth of minors if known. (iii) if any are non-resident.	

**PART 4 – TAXATION**

Please provide a copy of the deceased's latest tax return (if available)

Personal Public Service (PPS) number for the deceased	
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Any unpaid tax/repayment due or forthcoming liability (if known)	
Are there any outstanding health expenses claims in the last 4 years that are yet to be submitted to Revenue?	
Name and address of accountant or tax adviser (if any)	

### PART 5 – ASSETS/PENSIONS/POLICIES

Please provide details and specify if any were jointly held, with details of co-owner(s).

Please give account numbers where applicable, and approximate values if known.

Residence of the deceased	Professional valuations may be required. We will discuss the tax implications of this valuation with you in advance of valuations being obtained.
Other land and property (include details of lettings, if any)	As above.
Overseas property and overseas assets	
Cars, boats and other vehicles (include car registration numbers, make, model, year and approximate value)	
Other household & personal goods including jewellery, antiques, collections, ornaments and furniture	



Bank/Building society accounts (please provide account numbers and sort codes if known)	
Credit Union Accounts (Please confirm if the account was nominated and name(s) of nominee(s) if known)	
An Post Investments (Bonds, Savings Certificates, Accounts)	
Stocks/Shares/Securities	A professional valuation may be required which we can arrange if required.
Details of stockbroker, investment manager and/or financial adviser	
Cash, foreign currency and uncashed cheques	
Life insurance	
Pensions (please furnish contact details of administrators if known)	



Debts owed to the deceased	
Details of buildings/contents insurance policies <b>NOTE</b> insurer must be notified as soon as possible of the death	
Did the deceased have health insurance and if so, is there any claim outstanding?	
Business interests	
Agricultural assets (livestock, farm machinery, details of any entitlements)	
Other assets	

## PART 6 – LIABILITIES

Funeral director <b>NOTE</b> We can usually arrange for the funeral director's bill to be paid direct from the deceased's bank account	
Other funeral costs (e.g. flowers, catering, announcements). We may also be able to arrange for these to be paid/reimbursed from the deceased's bank account.	
Unpaid bills at date of death (e.g. credit cards)	
Loans and/or mortgages and details of any protection policies.	



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### PART 7 – FURTHER PARTICULARS

Did the deceased have any interest in a trust or settlement?	
Was the deceased the owner of a limited interest e.g. right of residence or life interest or annuity	
Did any person take a gift or after 5 December 1991 made by the deceased	
Was the deceased in receipt of any Social Welfare payments?	
Was the deceased in receipt of payments under the Nursing Home Support Scheme? Please provide Client ID number and confirm if there is a nursing home loan.	
Please confirm the length of occupancy by the deceased in a nursing home if applicable.	

### PART 8 – PROPERTIES HELD BY THE DECEASED

Provide location of Title Deeds	
Please provide LPT Property ID and Pin Numbers. We can apply for a LPT Deferral if required.	
Please provide utility account details at the deceased's address. We can apply for cancellation or continuation of supply and hold on payments during the administration period if requested	



In respect of any properties held by the deceased (other than their principal private residence) please provide NPPR Account details	
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#### PART 9 - MISCELLANEOUS

Please provide details of all utility account providers and account numbers held by the deceased	
Did the deceased have a current passport and/or driving licence?	
If mental illness is recorded on the Death Certificate please provide contact details for the deceased's GP.	
Please add any other information you think we should have.	

If you require clarification on any question in this form please contact us.

Signed .....

Date .....

Checklist of documents to be furnished by you (where applicable):

- Death Certificate
- Funeral Bill to include funeral director's bank account details if payment is to be requested by us from a financial institution.
- Funeral Catering Bill and receipts for any funeral related expenses such as memorial cards, headstone etc.
- Addresses for all Will beneficiaries as above /names and addresses for any beneficiaries entitled on intestacy (we will discuss entitlement on intestacy with you if applicable)



- LPT login details to include Property ID and Pin number for the deceased.
- Original Share Certificates
- Original An Post Savings Certificates/Bonds/Account Books
- Original Prize Bonds
- Original Life Policies
- Title Deeds if held by you.
- Letting Agreements in relation to any properties rented to or by the deceased.
- Passport and Driving Licence of the deceased if cancellation is required.
- Log Book for any vehicles
- **Copy passport and proof of address** (e.g. bank statement/utility bill dated within the last 3 months) for you for compliance purposes.

