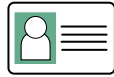


Estate Administration: concerns and claims relating to the estate

In order for us to assess your requirements and see if we are able to provide a fee estimate for assisting you, please complete this form, **save it** and send to **probate@coop.co.uk** and we will respond within 48 hours (2 business days).

Information about the deceased



To the best of your knowledge does Co-op Legal Services have any involvement with this estate?

Yes: Unfortunately we're unable to assist you and would recommend you seek advice from another provider.

No: Please complete and return this form to us.

Name:

Address:

Date of birth:

Date of death:

Deceased's marital status at death:

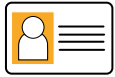
Married/civil partnership

Widowed/surviving
civil partner

Divorced

Single

Information about you



Name:

Status in relation to the estate:

Executor

Administrator under the Rules of Intestacy

Beneficiary or I have concerns about the estate

Your relationship to the deceased:

Address:

Telephone number:

Email address:

Contact preferences:

Telephone

Email

Time of day:

Morning

Afternoon

Early evening

Information about the will and/or Grant of Probate (if applicable)



Is there a will?

Yes No

Date of the will :

Was the will prepared by a professional?

Yes No

Date of the grant of probate/administration (if applicable):

Approximate value of the estate:

£

Information about the estate



Which of the following are present in the estate?

1. Bank & building society accounts/National Savings & Investments
2. Stocks, shares & investments
3. Life insurance
4. One property
5. Multiple properties
6. Business interests
7. Farming interests
8. Assets outside of England & Wales
9. Pensions
10. Annuities
11. Mortgage(s) / equity release
12. Debts
13. Utilities & council tax
14. Beneficiaries outside of England and Wales
15. Beneficiaries aged under 18
16. Charity beneficiaries
17. Missing beneficiaries
18. Mentally incapable beneficiaries
19. Deceased beneficiaries
20. Disputes in the family
21. Disputes with third parties
22. Trusts
23. Inheritance tax Income tax
Capital gains tax Other tax (e.g. VAT, stamp duty)
24. Missing assets
25. Chattels worth over £1,000
26. Insolvency issues
27. Estate accounts
28. Lifetime gifts
29. Lifetime tax planning

Please explain below what you would like help with and details of any relevant information. We've provided some examples below which might assist.

Examples of issues that can occur include:

- An executor/administrator (also known as a personal representative) failing to update a beneficiary
- A beneficiary's share not being properly calculated
- Delays in the distribution of an estate because a property sale has been held up by a beneficiary
- Concerns that the executor/administrator is spending money from the estate without any authority
- An executor/administrator has been asked for estate accounts but hasn't produced them
- A claim is being made against the estate for financial provision under the Inheritance (Provision for Family and Dependants) Act 1975. This allows certain people to claim if they have not been "reasonably" provided for. Please specify whether the claim or potential claim is being made by you or someone else.
- Concerns about the validity of the will under an earlier will or under the Rules of Intestacy. For example, did the deceased have capacity to make the will? Did they understand the terms of the will? Was there any "undue influence" on them? Was the will properly witnessed? Are there any unusual circumstances? Please specify whether, if the will is found to be invalid, you would be an executor/administrator and/or beneficiary.
- An issue in how the estate is being dealt with. For example, are the concerns that it's taking too long or that the executor/administrator has not been administering the estate correctly?
- Someone is living in the deceased's property and advice is needed on what to do next.



Please **save** and email this form to **probate@coop.co.uk** and we'll respond within 48 hours (2 business days).

Please note, that at this stage we're not acting on your behalf. We'll consider the information you've provided and assess if we're able to assist you. If we are able to assist, we will confirm this in writing, along with an estimate of our legal fees. Similarly, if we're unable to assist, we'll confirm this in writing.



It's what we do