Co-op Legal Services

Estate administration support after you've obtained a grant of probate.

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

Information about you Information about the deceased Name: To the best of your knowledge does Co-op Legal Services have any involvement with this estate? Address: Yes: Unfortunately were unable to assist you and would recommend you seek advice from another provider. No: Please complete and return this form to us. No: Please complete and return this form to us. Name of deceased: Your relationship to the deceased: Contact preferences: Telephone Trime of day: Date of birth of deceased: Morning Date of death of deceased: Afternon Early evening Divorced Widowed/surviving civil partner Single Is there a will? Yes No Widsthere all prepared by a professional?		
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Single Is there a will? Yes No Was the will prepared by a professional?		Divorced
Is there a will? Yes No Was the will prepared by a professional?		Widowed/surviving civil partner
Yes No Was the will prepared by a professional?		Single
Was the will prepared by a professional?		Is there a will?
Yes No		
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Details about the grant of probate

Date of the grant of probate/administration:

Approximate value of the estate: £

Information about the estate

Which of the following are present in the estate?

If you're unsure of everything that forms part the estate, advise us in the notes section below.

- 1. Bank and building society accounts / National Savings and Investments
- 2. Stocks, shares and investments
- 3. Life insurance
- 4. One property
- 5. Multiple properties
- 6. Business interests
- 7. Farming interests
- 8. Assets outside of England and Wales
- 9. Pensions
- 10. Annuities
- 11. Mortgage(s) / equity release
- 12. Debts
- 13. Utilities and 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. Taxes

(i) inheritance tax

(ii) income tax

(iii) capital gains tax

(iv) other tax (e.g. VAT, stamp duty)



Please <u>save</u> 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.



- 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.

Further information about the services we offer and our Privacy Policy can be found on our website www.co-oplegalservices.co.uk. Co-op Legal Services is a trading name for Co-operative Legal Services Limited which is authorised and regulated by the Solicitors Regulation Authority under registration number 567391. Information correct as at January 2021. Source: Web.