

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



Name:

Address:

Telephone number(s):

E-mail address:

Contact preferences:

Telephone

Email

Time of day:

Morning

Afternoon

Early evening

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 of deceased:

Your relationship to the deceased:

Address of deceased:

Date of birth of deceased:

Date of death of deceased:

Deceased's marital status at death:

Married/civil partnership

Divorced

Widowed/surviving civil partner

Single

Is there a will?

Yes No

Was the will prepared by a professional?

Yes No

Details about the grant of probate



Date of the grant of probate/administration:

Approximate value of the estate:

£

Which IHT forms did you complete:

IHT205

IHT217

IHT400

Don't know

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)

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.



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