

List of items required for Probate

1. Death Certificate(s)
2. Original Will (and Codicil)
3. Deeds or Land Registry documents
4. Statements re Pensions (State & Private)
5. National Insurance Number
6. Recent statements for Bank Account(s)
7. Passbooks for Building Society Account(s)
8. National Savings Certificates
9. Share Certificates
10. Premium bonds
11. Life Policies
12. Copy of last Income Tax Return and paperwork relating to income tax for the last year e.g. dividend tax vouchers, P60's, tax statements from financial institutions
13. Recent Utility bills: e.g. Council Tax, Water Rates, Gas, Electricity, Telephone
14. House Insurance details
15. Information relating to any loans or gifts made by the deceased or trusts set up by the deceased
16. Information relating to business assets
17. Information relating to Trusts where the deceased was a beneficiary

If there are Inheritance Tax issues the following will also be required:

1. Details of any lifetime gifts made by the deceased (e.g. gifts of property, cash to individuals or to a Trust), especially those amounting to more than £3,000 per annum. If any, details of the date of the gift and name of recipient.
2. If the deceased was a widow/er, details of late spouse: full name, date of death, National Insurance number, copy of Will and Grant.