



The probate process and the role of your solicitor

The following table explains the role of your solicitor at each of the various stages of obtaining probate. We hope this helps you to understand the process, and how our expert lawyers can support you at every step of the way.

You need to ...	Your solicitor will ...
Register the death with local registry office.	
Obtain the death certificate from the local registry office and a few certified copies.	
Locate the will if there is one.	
Instruct our probate solicitor to handle the legal work. Provide proof of your identity. Provide the will and copies of the death certificate.	Verify your identity. Explain the probate process to you depending on whether there is a will or, if not, how the intestacy rules apply.
	Identify the executor(s) appointed in the will. If there is no will, we identify the next of kin legally entitled to administer the estate.
Provide contact details of all known beneficiaries.	Identify the beneficiaries entitled under the will or the beneficiaries entitled under the intestacy rules.





<p>Provide:</p> <ul style="list-style-type: none">• details of properties• all bank and building society account details• share certificates• investments• premium bonds• national savings certificates• life insurance policies• pension and annuity details• details of other assets of value eg antiques, paintings, collectables and jewellery <p>Provide details of any debts and liabilities.</p> <p>Provide details of any lifetime gifts made by the deceased within the last seven years.</p>	
	<p>Identify whether we will apply for a grant of probate or letters of administration to deal with the estate (the grant).</p> <p>Contact relevant establishments for a final valuation of bank accounts, shares, investments, etc.</p> <p>Obtain valuations of property and any valuable items as at the date of death.</p> <p>We will calculate an initial value of all assets and liabilities.</p>





<p>You will make a statement of truth that the information provided is true and correct</p>	<p>We will calculate any inheritance tax due.</p> <p>Complete appropriate HMRC tax forms and pay inheritance tax.</p> <p>Send the probate application with the statement of truth and probate fee to the probate registry.</p>
	<p>Place statutory notices in the London Gazette and local newspapers to alert potential creditors of our intention to distribute the estate to the beneficiaries.</p>
	<p>We will give you two copies of the grant.</p> <p>Send the grant to the financial institutions and other asset holders and request full payment of the assets.</p> <p>Place the money into a dedicated executor's bank account.</p> <p>Settle outstanding estate expenses, debts and liabilities including any final inheritance tax due.</p> <p>Advise if varying any will may save inheritance tax or otherwise benefit the beneficiaries.</p>
	<p>Make a bankruptcy search of the Land Charges Register against beneficiaries.</p> <p>If a beneficiary has been declared bankrupt, we will contact the trustee in bankruptcy about where the beneficiary's inheritance should be paid into.</p>





	<p>If there are no challenges to the estate, we will distribute the net estate to the beneficiaries entitled under the will or the intestacy rules and obtain receipt.</p> <p>If any challenges to the will are expected, we will advise you on the implications.</p>
	<p>We will draft final estate accounts showing the complete record of financial transactions during the estate administration.</p>
<p>You will approve and sign off the final estate accounts.</p>	<p>Complete and file all paperwork.</p>

