

MILNE MOSER

SOLICITORS

PROBATE: YOUR FIRST APPOINTMENT

Below is a list of documents that we recommend that you bring with you to your first appointment, following a death:

Death certificate	
Will (unless we already hold it)	
Your identification documents	
Details of any property owned e.g. the deceased's home	
Address details for all beneficiaries	
Estimated cost of funeral	
National Insurance number	
Details of all financial assets e.g. bank accounts, building society accounts, investments	
Details of pensions	
Details of any shareholdings	
Details of any debts	
Lasting Power of Attorney plus all certified copies	
Details of any lifetime giving within the last 7 years	
Accountant's details	

If the deceased was married, we will also need the following documents:

Date and place where the deceased and their spouse were married	
Date of death of the deceased's spouse (if their spouse died first)	
Grant of Probate/Letters of Administration for the deceased's spouse (if their spouse died first)	