

A STEP BY STEP GUIDE TO PROBATE



1

Determine if a Will has been left

1a If a Will has been left, send the original Will to us

1b If no Will has been left, the rules of Intestacy apply. These are a set of rules which decide which family members inherit the assets. Any person related to the person that died will need to prove they are related to them by providing us with documents such as their birth and marriage certificate.

2

Provide us with important documents such as the Death Certificate and details of the assets left by the deceased (everything they owned) along with details of their income (for example pensions or salary).

2a If no Will has been left, provide us with a family tree with names and dates of birth of the known family members



3

Client care letter sent to the Executors named in the Will or the family members inheriting via the Intestacy Rules that wish to act as Administrators (a similar role to Executors)

4

Return client care letter and ID

5

Review the documents to establish the assets

6

Contact all relevant organisations to obtain valuations for the deceased's assets

7

Once valuations have been received, we shall prepare an Inheritance Tax (IHT) return and Oath

8

We meet the Executors or Administrators to review the documents

9

Inheritance Tax form signed and Oath sworn

9a Inheritance Tax paid to HM Revenues and Customs (HMRC)

9b Inheritance Tax receipt issued by HMRC

10

Application for a Grant of Representation submitted to the Probate Registry

11

Grant of Representation sent to us by the Probate Registry

12

Copies of the Grant of Representation submitted to relevant organisations to collect in the assets

12a If the person that died owned a house, it can now be sold

13

Liabilities and expenses paid (including our fees)

14

Income Tax return submitted to HMRC

15

HMRC confirm that Income Tax affairs have been settled

16

Final Estate Accounts sent to Executors or Administrators for their approval

17

Once approved by the Executors or Administrators, the Estate Accounts are sent to the Beneficiaries for their approval

18

Once approved by the Beneficiaries, the final payments are made

19

Estate Administration completed and important estate documents sent to the Executors or Administrators

The Probate Registry take approximately 10 working days to issue a Grant of Representation

Estate Administration can take between 8 and 10 months to complete from start to finish