

Probate Document Checklist

Gather Your Important Papers

Your Personal Details

First Name:

Last Name:

Probate Document Checklist

Death Certificate

Will (If applicable) *Please send it without pinning, stapling, clipping, or marking it in any way.

Estate Assets

Building Society Passbooks

Premium Savings Bonds

Other Relevant Securities

National Savings Bank Books

Stock and Share Certificates

Savings Certificates

Bank Statements

Life Insurance

Life Insurance Policy (If applicable)

*If the deceased paid for life insurance or is set to benefit from it when someone else passes away.

Property Documents (applicable only if they owned any property)

Deeds or information about their location

Insurance policies for vacant properties

Benefits and Pensions

Payment book for benefits received from the Department of Social Security. (If applicable)

Papers related to pensions from other sources

Please let us know if there were any changes to pension arrangements in the past 2 years.

Income Tax and Household Expenses

Papers related to income tax

Papers related to council tax, water rates, gas, electricity, and other household expenses