



GET A QUOTE PROBATE/ADMINISTRATION CLIENT QUESTIONNAIRE

WE WILL NEED TO CONTACT YOU

Please give us the following contact details:

Name*: [*mandatory]
Email*: [*mandatory]
Phone:
Postal address:

THE DECEASED'S WILL

1. DID THE DECEASED MAKE A WILL?

Yes
No

2. IF YES, WAS THE WILL DRAFTED BY A SOLICITOR?

Yes
No

3. DO YOU KNOW WHERE THE ORIGINAL WILL IS? IF YOU INSTRUCT US, WE WILL NEED IT.

Yes
No

4. ABOUT HOW MANY PEOPLE AND ORGANISATIONS BENEFIT?

5. IN HOW MANY DIFFERENT COUNTRIES ARE THOSE PEOPLE LIVING OR ARE THOSE ORGANISATIONS BASED?

6. ARE YOU AN EXECUTOR NAMED IN THE WILL?

Yes
No

7. IF YES, ARE THERE OTHER EXECUTORS?

Yes
No

8. IF YES, SAY HOW MANY

9. IF THERE IS NO WILL, ARE YOU THE CLOSEST RELATIVE?

Yes

No

10. IF NO, ARE THERE OTHER INDIVIDUALS WHO ARE RELATED IN THE SAME WAY AS YOU TO THE DECEASED?

Yes

No

11. WHAT WAS THE DECEASED'S MARITAL/CIVIL STATUS?

Single

Married

In a civil partnership

Divorced/civil partnership dissolved

Widow/surviving civil partner

Cohabiting

Other (please explain):

12. DID ANY OF THE FOLLOWING DIE BEFORE THE DECEASED?

Spouse

Civil partner

Cohabiting partner

(This information is important for us, because if probate/administration was not taken out for the estate of a deceased spouse or partner, it may be necessary to take out a probate/administration to that person's estate and distribute their estate before the probate/administration now sought can proceed.)

13. DID ANY SEPARATION, DIVORCE OR DISSOLUTION OF A CIVIL PARTNERSHIP OF THE DECEASED HAPPEN ABROAD?

Yes

No

14. DID THE DECEASED HAVE CHILDREN?

Yes

No

15. IF YES, HOW MANY CHILDREN ARE UNDER 18 YEARS?

16. IF YES, HOW MANY CHILDREN ARE OVER 18 YEARS?

17. DID THE DECEASED MAKE SPECIAL ARRANGEMENTS DURING THEIR LIFE OR IN THEIR WILL FOR A SPOUSE/CIVIL PARTNER/COHABITEE OR ANY CHILD WHO IS/WAS LIVING WITH A DISABILITY?

Yes

No

THE DECEASED'S ASSETS

18. WHAT ASSETS DID THE DECEASED HAVE?

PLEASE INDICATE IF THOSE ASSETS WERE IN THE DECEASED'S SOLE NAME:

Dwelling	Sole name	Jointly with others
Land	Sole name	Jointly with others
Pension schemes	Sole name	Jointly with others
Life policies	Sole name	Jointly with others
Shares	Sole name	Jointly with others

Other, please explain:

19. DID THE DECEASED HAVE THE FOLLOWING:

Business

Farm

20. ARE THE DECEASED'S ASSETS LIKELY TO BE:

Less than €500,000

€500,000 to €1 million

More than €1 million

Don't know

(This information is important to indicate to us whether inheritance tax advice will be needed. It may also be necessary to liaise with beneficiaries to ensure that inheritance tax forms are completed by them.)

21. DID THE DECEASED HAVE ASSETS ABROAD?

Dwelling

Land

Pension

Life policies

Shares

Don't know

22. PLEASE INDICATE IF THE FOLLOWING ARE AVAILABLE:

Original title deeds relating to all property

Life assurance policies

Original share certificates

Don't know

32. DO YOU KNOW IF THE DECEASED WAS A TRUSTEE OF ANY TRUST* RELATING TO HIS/HER PERSONAL AFFAIRS OR OTHER INTERESTS?

Yes

No

Don't know

** A trust is a legal mechanism whereby property can be put in the names of people (trustees) who do not own it, but simply hold it for the benefit of others. The trustees make the necessary ongoing arrangements in relation to the property.*

33. PLEASE LET US KNOW ANYTHING ELSE ABOUT THE DECEASED'S CIRCUMSTANCES OR ASSETS WHICH YOU BELIEVE WOULD BE IMPORTANT FOR US TO KNOW AT THIS POINT OR ABOUT WHICH YOU ARE CONCERNED.

DISCLAIMER

Our quotation for professional fees will not include additional work that might arise because of the deceased's particular circumstances. Examples would include the following, but there could also be other additional work:

- Sale of any house or other property. We can quote separately for this – [click here for information about sale of property quotations](#).
- Disputes among family members or others about the terms of the will.
- Advice in relation to potential litigation against the deceased's estate.
- Dealing with outstanding debts, including mortgage arrears or social welfare liabilities.
- Taxation advice and/or services, including dealing with arrears.
- Missing beneficiary who must be traced.
- Litigation to interpret some wording in the will.
- Missing share certificates.
- Litigation against the deceased's estate.

COMPLETING THE QUESTIONNAIRE

If you opt to complete the questionnaire yourself before contacting a firm, then when you have selected a firm or firms, you can send the completed questionnaire to them by email or post.