

## CHECKLIST OF INFORMATION REQUIRED TO COMPLETE APPLICATION FORMS

- (a) Details of the value of any property owned in the deceased's sole name, such as:-
  - (1) House
  - (2) Bank Accounts
  - (3) Building Society Accounts
  - (4) Saving Certificates
  - (5) Shares
  - (6) Car
  - (7) Premium Bonds
  - (8) National Savings Income Bonds
  - (9) Insurance Policies
  - (10) Unit Trusts
  - (11) Personal Equity Plans/Individual Savings Accounts (ISAs)
  - (12) Business or Agricultural Property
  - (13) Other property
- (b) Details of the value of any assets owned with the Deceased and another person or persons in joint names.
- (c) Details of any Trust property in which the Deceased held an interest.
- (d) Details of whether the Deceased made any substantial gifts within the last seven years.
- (e) Details of any debts owed by the Deceased for example their mortgage or outstanding bills eg., gas, electricity, water rates, council tax, income tax.
- (f) Details of the Deceased's income tax district/tax reference.
- (g) The current addresses of all beneficiaries mentioned in the Will (and their full names).
- (h) The dates of birth of any beneficiaries who are minors.
- (i) The dates of death of any beneficiaries who have died before the Deceased.
- (k) The Death Certificates.
- (l) The Deceased's last Will (if one exists).