EXECUTRY NOTES

Where you are instructing a Solicitor to deal with the estate you can use the attached form to help ensure that the necessary information and instructions are given as early as possible.

Dealing with the initial stages of the administration of a deceased person's estate often involves 'detective' work – seeking information and 'clues' to find out the actual estate and its value. Since not discovering all the estate details before applying for Confirmation of the Executors can lead to future delays and additional formalities and cost, it is a good idea to try to make sure that the person dealing with the administration has all the available information and documents as quickly as possible.

Use the right hand column of the attached form as a check list. It contains details of the numerous types of documents and paperwork which relate to the deceased person and the estate and which you should offer to pass over to the Solicitor. The list is lengthy and not every item will be available or needed in every estate. In some cases it may only be later that some document comes to hand and when that happens the document should be given immediately to the Solicitor.

The left hand column details the type of information the Solicitor will require. It will be helpful if you make notes and take these to your first meeting with the Solicitor with the available documents listed in the right hand column. If the space provided in this form is insufficient please make and take to the meeting separate notes. Do not worry if you do not have all the suggested information or documentation, your Solicitor will help.