



ADMINISTRATION CHECKLIST

We have compiled this checklist as a guide to what you can expect to encounter when administering the average estate. It is not intended to be a comprehensive summary, but more of an overview. We strongly recommend you call us before you do anything; we have often been able to save families a great deal of time, money and grief when dealing with an estate even if they do not need to apply for a Grant of Representation.

1 REGISTER THE DEATH

BEFORE YOU CAN REGISTER A DEATH YOU NEED A MEDICAL CERTIFICATE FROM A G.P. OR HOSPITAL DOCTOR. YOU HAVE 5 DAYS IN WHICH TO REGISTER THE DEATH. TO FIND A REGISTRY IN YOUR AREA GO TO WWW.PROBATEBUREAU.COM/LINKS.

2 ARRANGE THE FUNERAL

WE RECOMMEND YOU SELECT AN INDEPENDENT FUNERAL DIRECTOR – THEY GIVE A SUPERIOR SERVICE AT A LOWER COST BECAUSE THERE IS NO PARENT COMPANY TAKING A PERCENTAGE. FOR AN INDEPENDENT FUNERAL DIRECTOR IN YOUR AREA GO TO WWW.PROBATEBUREAU.COM/LINKS. THE FUNERAL IS THE FIRST CHARGE AGAINST THE ESTATE SO IF THERE ARE FUNDS IN THE DECEASED'S BANK ACCOUNT THE BANK WILL PAY THE FUNERAL INVOICE UPON PRESENTATION. DON'T GO TO THE BANK FIRST, THEY MAY FREEZE AN ACCOUNT THAT YOU ARE ENTITLED TO ACCESS. CALL US FOR MORE ADVICE ON THIS.

3 PROTECT ASSETS & YOURSELF

IF YOU ARE THE EXECUTOR OR LEGAL NEXT OF KIN, YOU ARE PERSONALLY LIABLE TO PROTECT ASSETS AGAINST LOSS. FOR EXAMPLE YOU WILL NEED TO ENSURE THAT VEHICLES AND PROPERTY ARE INSURED. PLEASE NOTE THAT THE CONTENTS ELEMENT OF ANY EXISTING HOUSEHOLD INSURANCE MAY LAPSE, SO SECURE ANY VALUABLES AS SOON AS POSSIBLE.

4 LOCATE DOCUMENTS & PEOPLE

LOCATE ANY LAST WILL & TESTAMENT OR CODICIL.

LOCATE BANK STATEMENTS, SAVINGS CERTIFICATES, BILLS, DEBTS, UTILITIES, ETC – CALL US FOR A COMPREHENSIVE LIST.

LOCATE MISSING BENEFICIARIES.

IDENTIFY ANY FOREIGN ASSETS, CLOUD-BASED ASSETS AND SOCIAL MEDIA ACCOUNTS & PASSWORDS.

OBTAIN PROPERTY VALUATIONS – YOU MAY NEED A CHARTERED SURVEYOR'S VALUATION IF YOU INTEND TO KEEP ANY PROPERTY. CHATTELS MAY NEED TO BE VALUED, ESPECIALLY IF THE ESTATE IS OVER THE NIL RATE BAND.

5 COMPILE ALL INFORMATION & DOCUMENTATION AND SUBMIT

BRING ALL THIS DOCUMENTATION TOGETHER, COMPLETE ALL THE PROBATE AND TAX FORMS (ARRANGE PAYMENT OF ANY INHERITANCE TAX BEFORE YOU CAN APPLY FOR PROBATE) THEN APPLY FOR PROBATE (OR

LETTERS OF ADMINISTRATION IF THERE IS NO WILL). CALL US FOR AN EXPLANATION OF THE NEW PROPERTY NIL RATE BAND ('PNRB').

6 RECEIVE & PAY ALL ASSETS AND LIABILITIES

ONCE YOU HAVE CLEARANCE AND A GRANT YOU MAY PAY CALL IN ALL ASSETS AND PAY ALL DEBTS AND LEGACIES. IF YOU HAVE NOT ALREADY DONE SO, YOU SHOULD OPEN AN EXECUTORS' BANK ACCOUNT TO LOG ALL DEBITS AND CREDITS.

7 DISTRIBUTE THE ESTATE

OBTAIN INLAND REVENUE CLEARANCE, COMPILE A FINAL ESTATE ACCOUNT AND DISTRIBUTE THE ESTATE TAKING CARE (ESPECIALLY IF THERE IS NO WILL) TO PAY THE RIGHT AMOUNT TO THE RIGHT PERSON. REMEMBER, YOU ARE PERSONALLY LIABLE! CHECK YOU HAVE COVERED EVERYTHING USING OUR PROBATE PROCEEDURE GUIDE AT WWW.PROBATEBUREAU.COM/HOME.

YOUR NOTES

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