WANSBROUGHS
ESTD. 1882

ESTATE ADMINISTRATION QUESTIONNAIRE

PERSONAL DETAILS	
Deceased's full name	
Was the deceased known by any other name? If so, please provide details.	
Date of birth	
Date of death	
Place of residence	
Place of death	
Domicile (if known)	
National Insurance Number	
SPOUSE'S DETAILS	
Spouse's full name	
Spouse's date of birth	
Spouse's National Insurance Number	
Date of marriage	
Date of death (if applicable)* **please provide a copy of the Grant of Probate, Will and death certificate of a predeceased spouse, where available*	
Spouse's domicile (if known)	
Spouse's tax residence (if known)	

CHILDREN & DEPENDANTS	
Children: please provide names, national insurance numbers, addresses, ages and marital status of all the deceased's children (using a separate sheet, if required). Please also include details of any deceased children	
Grandchildren: please provide details as with children above	

DETAILS OF THE DECEASED'S WILL(S) (if any)	
Will: date of any Will and Codicil(s) (please also provide a copy)	
Executor(s): please include name, address, dates of birth, National Insurance Numbers and email addresses	
Other Wills: if the deceased had Wills outside the UK, please list details here and provide a copy	
Powers of Attorney: did the deceased have Lasting Powers of Attorney (**LPAs**) or an Enduring Power of Attorney (**EPA**) in place at the time of their death? If so, please provide details.	
MAIN RESIDENCE	
Full address and postcode of deceased's home	
Did the deceased own their home? If so, how and what share did they own?	
What was the estimated value of their home?	

Please provide the details of any joint owner	
Please provide details of any mortgages on the property	
Please provide details of any outstanding utility arrears/credits	
HOUSEHOLD CONTENTS & PERSONAL EFFECTS	
Jewellery: if the deceased held any jewellery (worth over £1,500), works of art, antiques or other collections or items which had significant value, please provide details (including valuations, if known)	
If any of the above items were listed on a household insurance policy, please confirm the details and provide a copy of the policy.	
Approximate value of other contents and personal effects not listed above (i.e. other than the jewellery (over £1,500, works of art, antiques, collections, etc).	
Were any items owned jointly with someone else?	
Are any household or personal items being donated to charity?	
Heritage assets: are any items designated as national heritage assets and eligible for conditional exemption from IHT?	
Vehicles: please detail car or vehicle (manufacturer, model, year of registration, condition)	

OTHER ASSETS	
Other properties: did the deceased own any other land or buildings (either in the UK or abroad)? If so, please provide the same details as above in relation to their main residence	
Cash: did the deceased hold any cash or uncashed traveller's cheques at their home?	
Digital assets: did the deceased own any digital assets with monetary value (including cryptoassets)? If so, please provide details.	
Bank and Building Society Accounts: please provide details of estimated values, account numbers, sort codes and whether a sole or joint account	
National Savings Bank Account: please provide details as above (if applicable)	

Premium Bonds: please provide details, including bond numbers (if applicable)	
National Savings Certificates: please provide details as above (if applicable)	
Investment accounts: please provide details of any investments held (including investment manager details, if known)	
Business interests: did the deceased have any other unlisted stocks and shares or business interests? If so, please provide details, including details of the business where known and structure.	
Agricultural property: did the deceased own any agricultural property? If so, please provide details, including details of any agricultural activities carried out by the deceased or an entity (including partnership) in which they had an interest.	

Debts due to the estate: did the deceased make any loans which were still outstanding at their date of death (including any to family members)?	
Interest in another estate: had the deceased inherited any assets from another's estate within the five years before the deceased's date of death? If so, please provide details.	
Trusts: was the deceased the beneficiary or future beneficiary of any trusts? If so, please provide details.	
Please provide details of any private or occupational pensions or annuities which the deceased held or received	
Are there any pension arrears due to the deceased's estate or any overpayments due to be paid by the estate?	

Did the deceased, within two years of death, transfer or dispose of any benefits payable?	
Did the deceased have any life or other insurance policies which become payable as a result of their death (including any connected to a mortgage)? If so, please provide details.	
LIABILITIES	
Council Tax: please provide details of any liability owing	
Water rates: please provide details of any liability owing	
Gas: please provide details of any liability owing	
Electricity: please provide details of any liability owing	
Telephone / mobile phone bills: please provide details of any liability owing	
Credit cards: please provide details of any liability owing	
Funeral account: please provide details of any liability owing and include name and address of undertakers	
Other known unpaid bills or loans owing: where known, please provide details of any liability owing (including any outstanding medical expenses)	

TAX AFFAIRS	
Tax residence: where was the deceased tax resident? If applicable, please provide further details if they may have been tax resident outside the UK	
Accountant: did the deceased have an accountant or adviser who dealt with their personal tax affairs?	
Self-Assessment: did the deceased complete self-assessment tax returns during their lifetime?	
LIFETIME GIFTS	
Lifetime gifts: please provide details of any gifts made by the deceased in the seven years prior to death (including item/cash given, date and recipient). This would include any loans written off, as well as gifts to a trust or the payment of a life policy.	
Gifts to children: did the deceased make any gifts to children since the date of their Will? If so, was it intended that these gifts would reduce any assets being left to their child in their Will?	
Any other relevant information	