

Probate Preparation Checklist

- Original Will located
- Death certificate obtained
- List of assets and liabilities
- Property valuation (HMRC requirements)
- Bank accounts and investments statements
- Pension details
- Life insurance policies
- Debts, loans, and credit cards list
- HMRC Inheritance Tax forms prepared
- Probate application completed (online or paper)
- Probate fee paid
- Estate accounts drafted
- Beneficiaries contact details confirmed
- Estate distributed as per Will or intestacy rules

