1. Initial Contact & Estate Overview

Deceased Full Name

Date of Death

Last Address

Will Location

Executor Name

Relationship to Deceased

Phone

Email

Estimated Gross Estate Value

2. Full Asset & Liability Schedule

Property Address & Value

Mortgage Outstanding

Bank Accounts & Balances

Investments & Shares

Pensions & Death Benefits

Life Insurance Policies

Outstanding Debts

Funeral Costs

Gifts in Last 7 Years

3. Inheritance Tax & Compliance Declaration

Nil Rate Band Available

Residence Nil Rate Band

Business/Agricultural Relief

Foreign Assets

Trust Interests

Source of Funds Declaration

PEP Declaration (Yes/No)

Executor Declaration: I confirm the information provided is true and accurate.

Date: