

## ICAEW Probate Accredited Accountant Checklist

So that we can help you as best as possible, please provide the following documents and details before or at your first meeting with us.

We can assist you with collating missing information where required – please ask about this service.

### *Personal Information:*

- Death certificate
- Divorce certificate (where applicable)
- Original will
- National Insurance number
- Date of marriage/civil partnership and the Registry address

### *Details of the Estate:*

- Bank and Building Society accounts
- Savings accounts
- Personal belongings
- Stocks and shares
- Property valuations
- Tax records
- Pension details
- Loans
- Debts
- Mortgages
  
- Copy of death certificate
- Grant of Probate and IHT 400 for pre-deceased spouse or civil partner

### *Details of the Executors:*

- Valid ID
- Proof of address

### *Funeral Details:*

- Information about the funeral including costs.