

Probate Application Form - PA1

Please use **BLOCK CAPITALS**



Name of deceased

Interview venue

(see PA4)

Dates to avoid

Please read the following questions and PA2 booklet 'How to obtain probate' carefully before filling in this form. Please also refer to the Guidance Notes PA1a where an item is marked *.

PLEASE COMPLETE ALL SECTIONS.

***A1** Did the deceased leave a will/codicil?
(Note: These may not necessarily be formal documents. If the answer to question 1 is Yes, you must enclose the **original** document(s) with your application.)

A2 Did the deceased marry or enter into a Civil Partnership after the date of the will/codicil?

A3 Is there anyone under 18 years old who receives anything in the will/codicil?

A4 Did any of the witnesses to the will or codicil or the spouse/civil partner of any witness receive a gift under the will/codicil? If Yes, state name of witness.

A5 Are there any executors named in the will/codicil?

***A6** Give the names of those executors who are **not** applying and the reasons why. **Note: All** executors **must** be accounted for.

Section A: The Will / Codicil			
Will		Codicil	
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If No to both questions, please go to Section B			
Yes <input type="checkbox"/>	Date: <input type="text"/>	No <input type="checkbox"/>	No <input type="checkbox"/>
Yes <input type="checkbox"/>		No <input type="checkbox"/>	No <input type="checkbox"/>
Yes <input type="checkbox"/>		No <input type="checkbox"/>	No <input type="checkbox"/>
Yes <input type="checkbox"/>		No <input type="checkbox"/>	No <input type="checkbox"/>
Full names		Reason A,B,C,D,E	
<input type="text"/>		<input type="text"/>	
<input type="text"/>		<input type="text"/>	
<input type="text"/>		<input type="text"/>	

This column is for official use

Date of will

Date of codicil

A = Pre-deceased
B = Died after the deceased
C = Power Reserved
D = Renunciation
E = Power of Attorney

***B1 - B6**

Please refer to the Guidance Notes.

Sections B1 - B4 must be completed in all cases.

Please state the **number** of relatives of the deceased in categories B1 - B4.

If there are no relatives in a particular category, write 'nil' in each box and move onto the next category.

Note: Sections B5 and B6 only need to be completed if the deceased had no relatives in Section B1 - B4.

Section B: Relatives of the deceased			
		Under 18	Over 18
B1	Surviving lawful husband or wife or surviving lawful civil partner	<input type="text"/>	<input type="text"/>
B2a	Sons or daughters who survived the deceased	<input type="text"/>	<input type="text"/>
b	Sons or daughters who did not survive the deceased	<input type="text"/>	<input type="text"/>
c	Children of person(s) indicated at '2b' only , who survived the deceased *	<input type="text"/>	<input type="text"/>
B3	Parents who survived the deceased	<input type="text"/>	<input type="text"/>
B4a	Brothers or sisters who survived the deceased	<input type="text"/>	<input type="text"/>
b	Brothers or sisters who did not survive the deceased	<input type="text"/>	<input type="text"/>
c	Children of person(s) indicated at '4b' only , who survived the deceased *	<input type="text"/>	<input type="text"/>
B5	Grandparents who survived the deceased	<input type="text"/>	<input type="text"/>
B6a	Uncles or aunts who survived the deceased	<input type="text"/>	<input type="text"/>
b	Uncles or aunts who did not survive the deceased	<input type="text"/>	<input type="text"/>
c	Children of person(s) indicated at '6b' only , who survived the deceased *	<input type="text"/>	<input type="text"/>

Please note that the grant will normally be sent to the first applicant. Any applicant named will be required to attend an interview. It is, however, usually only necessary for one person to apply (please see PA2 booklet, page 3).

C1 Title

Mr Mrs Miss Ms Other

C2 Forenames

C3 Surname

C4 Address

Postcode: _____

C5 Telephone number

Home _____

Work _____

E-mail address (optional)

C6 Occupation

C7 Are you related to the deceased?

Yes

No

If Yes, what is your relationship?

Relationship: _____

C8 If there are any other applicants, up to a maximum of three, give their details. (Note: **All** applicants named in Sections C1 and C8 must attend an interview.)

Please give details below as C1 to C7 of other applicants who are entitled to apply and wish to be named in the grant.

C9 Name and address of any surviving lawful husband or wife/civil partner of the deceased, unless stated above.

Postcode: _____

***C10** If you are applying as an attorney on behalf of the person entitled to the grant, please state their name, address and capacity in which they are entitled (e.g. relationship to the deceased).

Postcode: _____

Relationship: _____

***C10a** Has anyone been appointed by the person entitled as their attorney under an Enduring Power of Attorney (EPA) or a Property and financial affairs Lasting Power of Attorney (LPA)?

EPA

LPA

No

***C10b** If Yes, has it been registered with the Office of the Public Guardian?

Yes

No

***C10c** Does the donor of the EPA/LPA lack mental capacity within the meaning of the Mental Capacity Act 2005? (see PA1a)

Yes

No

Section C: Details of applicant(s)

This column is for official use

I.T.W.C

Section D: Details of the deceased

This column is for official use

***D1** Forenames

***D2** Surname

***D3** Did the deceased hold any assets **(excluding joint assets)** in another name?

Yes No

***D4a** If Yes, what are the assets?

And in what name(s) are they held?

D4b Was the deceased known by any other name in which he/she made a will? If so, what name was it made in?

Yes No

D5 Last permanent address of the deceased.

Postcode: _____

D6 Date of birth

D7 Date of death

Age: _____

Domicile

***D8** Was England and Wales the domicile/permanent home of the deceased at the date of death? If No, please specify the deceased's permanent home or domicile.

Yes No

***D9** Tick the last **legal** marital or civil partnership status of the deceased, and give dates where appropriate.

Bachelor/Spinster
 Widow/Widower/Surviving Civil Partner
 Married/Civil Partnership Date: _____
 Divorced/Civil Partnership dissolved Date: _____
 Judicially separated Date: _____

Note: These documents (◆) may usually be obtained from the Court which processed the divorce/dissolution of civil partnership/separation.

*(If the deceased did **not** leave a will, please enclose official copy* of the Decree Absolute/Decree of Dissolution of Civil Partnership/Decree of Judicial Separation (as applicable))*

***D10** Was the deceased legally adopted?

Yes No

***D11** Has any relative of the deceased been legally adopted? (If Yes, give name and relationship to deceased.)

Yes No

Name: _____

Relationship: _____

D12 Answer this section **only** if the deceased died before 4th April 1988 or left a will or codicil dated before that date.

D12a Was the deceased illegitimate?

Yes No

D12b Did the deceased leave any illegitimate sons or daughters?

Yes No

D12c Did the deceased have any illegitimate sons or daughters who died leaving children of their own?

Yes No

True name

Alias

Address

D/C district and No.

L.S.A.

D.B.F.

Section E: Details of the estate

i) Complete this section if you have filled in form IHT205 (2006)/IHT207. You must file the form IHT205 (2006)/IHT207 with your application.

If you have filled in a version of the IHT205 (2006) or IHT205 dated before 1st January 2011 please ring the Helpline on 0845 30 20 900 for advice.

I/We confirm that I/we have filled in form IHT205 (2006)/IHT207 and I/we confirm that from the answers I/we have given on that form I am/we are not required to fill in form IHT400 for this estate and the estate qualifies as an excepted estate. (Delete as applicable)

If you have filled in form IHT205 (2006) –

Please transfer the following figures from form IHT205 (2006) onto this form:

Figure from box D	£
Figure from box F	£
Figure from box H	£

If you have filled in form IHT207 –

Please transfer the following figures from form IHT207 onto this form:

Figure from box A	£
Figure from box C	£
Figure from box H	£

ii) Complete this section if you have filled in form IHT400 and IHT421.

Please transfer the following figures from form IHT421 on to this form:

Gross value of assets (from Box 3 on the IHT421)	£
Net value (from Box 5 on the IHT421)	£

At the same time as sending the probate application forms to the probate registry you **must** also send the **IHT400** (and associated schedules and copy documents) and **IHT421** to:

HMRC, Inheritance Tax, Ferrers House, PO Box 38, Castle Meadow Road, Nottingham, NG2 1BB (DX701201 Nottingham 4)

When the tax has been paid or assessed to be an estate where tax is not payable HMRC will send the stamped IHT421 to the appropriate probate registry as you have indicated on the IHT421 form.

Section F: Submitting your application – Important information

Please send your application to the probate registry which controls the interview venue you wish to attend (see PA4) otherwise your application may be delayed.

You should send the following documents as applicable:

PA1

IHT205 (2006)/IHT207/IHT217 signed by all applicants (see Section E i)

Note: Do not enclose IHT400 or IHT421 – these must be sent to HMRC (Inheritance Tax) (see Section E ii)

Original will and codicils plus two A4 sized photocopies of the will/codicil(s) (see separate notes)

Note: Do not remove or attach anything to the will/codicil

An official copy of any foreign will or any will dealing with assets abroad (and a translation if necessary)

Official copy of death certificate or coroner's letter – **not a photocopy**

Other documents as requested on PA1

Please state the number of official copy grants required to deal with assets **in** England and Wales (see PA3)

Please state the number of official copy grants required to deal with assets **outside** England and Wales (see PA3)

Please state total amount of cheque enclosed for fee (made payable to **HM Courts & Tribunals Service**) including cost for the number of official copy grants stated above (see PA3)

Dated

PLEASE ENSURE THAT ALL THE INFORMATION GIVEN IS ACCURATE AND THAT YOU KEEP COPIES OF ALL DOCUMENTS SENT. IF YOU DO NOT ENCLOSE ALL THE RELEVANT ITEMS YOUR APPLICATION MAY BE DELAYED.