

Preparing for the inevitable...



Probate is not an easy thing. But when a loved one has died and the funeral has been arranged, thoughts must eventually turn to the next steps – sorting out their personal affairs and administering the estate.

We know that this can seem a daunting task but our team are here to help you. The first step is generally for you to contact your solicitors to talk things through at a meeting – and at Cripps we remain hugely accessible – you can phone or drop us an email, whichever is more convenient. Once we have a date in the diary, it does help (both you and us) if you are able to do a little preparation. Working out where and what everything is important, but don't worry, this isn't an interview or exam; our aim is always to ensure you are at ease with an informal chat, so that we can begin to understand the work that needs to be done and to answer any initial questions you may have.

If you haven't already done so, the death will need to be registered, ideally before we meet. It is also useful if you send us a copy of the Will (if available) before the meeting. It just helps us to prepare and familiarise ourselves with the details of the estate.

The most important document for you to bring to our first meeting though, along with any will, is the original death certificate; anyone holding the deceased's assets or owing something to the estate will need to see a copy of it before they will release anything to you or to us. It's an important element in getting communication going. You can help us by gathering as much information as you can find about the deceased's assets and liabilities. This will be very useful as we try to identify everyone who we need to approach to ask for valuations and other details. Useful information includes:

- Bank account numbers;
- National insurance number;



- Vehicle registrations;
- Policy and investment references;
- Utility provider account numbers;
- National Savings & Investment account numbers;
- Building Society references;

But, most importantly, please bring along any questions or concerns you may have – That’s what we’re here for. We’re here to help and we will do our utmost to do so.

If you would like assistance with administering an estate, please get in touch with our [wills, trusts and probate team](#).



[Claire Tyrrell](#)

Probate Manager (Legal Director)