

# Probate Application Form - PA1

Please use **BLOCK CAPITALS**

Name of deceased

Forenames
Surname

Please state where you wish to be interviewed (see enclosed PA4). You can be interviewed at the Controlling Probate Registry of your choice or at one of its interview venues. Please also specify dates when you will **not** be available for interview.


**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 enclosed where an item is marked \*.**

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

**A3** Are there any executors named in the will/codicil?

**\*A4** Give the names of those executors who are **not** applying and the reasons why. Please see attached Guidance Notes. **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 <b>No</b> to both questions, please go to Section B			
Yes <input type="checkbox"/>		No <input type="checkbox"/>	
Yes <input type="checkbox"/>		No <input type="checkbox"/>	
Full names		Reason A,B,C,D,E	

This column is for official use

Date of will/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

Please state the **number** of relatives in **each** category and complete each category fully (i.e. B1, B2 etc.).

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

## Section B: Relatives of the deceased

Number (if none, write nil)	Under	Over
	18	18
B1 Surviving <b>lawful</b> husband or wife		
B2a Sons or daughters who survived the deceased		
<b>b</b> Sons or daughters who did <b>not</b> survive the deceased		
<b>c</b> Children of person(s) indicated at '2b' <b>only</b> who survived the deceased *		
B3 Parents who survived the deceased		
B4a Brothers or sisters who survived the deceased		
<b>b</b> Brothers or sisters who did <b>not</b> survive the deceased		
<b>c</b> Children of person(s) indicated at '4b' <b>only</b> who survived the deceased *		
B5 Grandparents who survived the deceased		
B6a Uncles or aunts who survived the deceased		
<b>b</b> Uncles or aunts who did <b>not</b> survive the deceased		
<b>c</b> Children of person(s) indicated at '6b' <b>only</b> who survived the deceased *		

**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  
**C2** Forenames  
**C3** Surname  
**C4** Address

**C5** Telephone number

**C6** Occupation

**C7** Are you related to the deceased?  
 If Yes, what is your 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.)

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

**\*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).

**C10a** Has the person named in section C10 signed an Enduring Power of Attorney?

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

### Section C: Details of applicant(s)

This column is for official use

I.T.W.C

Mr  Mrs  Miss  Ms  Other

Postcode: \_\_\_\_\_

Home \_\_\_\_\_

Work \_\_\_\_\_

Yes  No

Relationship:

Details of other applicants who wish to be named in the grant of representation. (Please give details as C1 to C7.)

Postcode:

Postcode:

Relationship:

Yes  No

Yes  No

## 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

**\*D4** If Yes, what are the assets?

And in what name(s) are they held?

**D5** Last permanent address of the deceased.

Postcode: \_\_\_\_\_

**D6** Date of birth

**D7** Date of death

Age: \_\_\_\_\_

**D8** Was England and Wales the permanent home of the deceased? If No, please specify the deceased's permanent home.

Yes  No

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

Bachelor/Spinster

Widowed

Married  Date: \_\_\_\_\_

Divorced  Date: \_\_\_\_\_

Judicially separated  Date: \_\_\_\_\_

*(If the deceased did **not** leave a will, please enclose official copy\* of the Decree Absolute.)*

*(If the deceased did **not** leave a will, please enclose official copy\* of the Decree of Judicial Separation.)*

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

Yes  No

**\*D11** Has any relative of the deceased been legally adopted?

Yes  No

(If Yes, give name and relationship to deceased.)

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.

**Important** - please complete the checklist overleaf before submitting your application

# Checklist

# Important

Please return your forms to the probate registry which controls the interview venue at which you wish to be interviewed (see PA4) otherwise your application may be delayed.

Before sending your application, please complete this checklist to confirm that you have enclosed the following items:

- 1 PA1 (Probate Application Form)
- 2 Either IHT205 (signed by all applicants)  
or D18 (signed)   
**Note:** Do not enclose IHT Form 200 – **this must be sent to C.T.O.** (see PA2)
- 3 Original will and codicil(s), **not a photocopy**   
**Note:** Do **not** attach anything to the will/codicil
- 4 Official copy of death certificate or coroner's letter, **not a photocopy**
- 5 Other documents as requested on PA1 – please specify
  
- 6 Please state number of official copy grants required for use in England and Wales (see PA3)
- 7 Please state number of official copy grants required for use **outside** England and Wales (see PA3)  **For official use only (sealed and certified)**
- 8 Please state total amount of cheque enclosed for fee (made payable to HMPG) including cost for the number of official copy grants stated in 6 and 7 above.  £

**Note: If you do not enclose all the relevant items, your application may be delayed.**

## Official Use Only

Type of grant:

Power reserved to \_\_\_\_\_ [Name of executor/s]

Will message: with a codicil / and \_\_\_\_\_ codicils (delete as appropriate)

Limitation \_\_\_\_\_

Min interest Yes / No

Life interest Yes / No

Figures:- DNE / amounts to Gross: £

Net: £

Fee paid:  £

**Clearing:-**

**Title:-**

**Footnote:-**