



PREPARATION FOR PROBATE APPOINTMENT

Thank you for making an appointment with Citizens Advice Bureau for assistance with a Probate Application.

What you can expect

Not one Application for Probate is the same and so the purpose of your first meeting is to establish what type of Application you may require.

If your Application is complex, your solicitor will advise you how we can assist or alternatively we will refer you to the Law Society to find a private solicitor who can assist you further.

If your Application is straight forward we will advise you on the best options for completing your Application for Probate.

Initial check:

- Do you have the original will? Is the will dated?
- Are there 2 witnesses, and signed on all pages of the will?
- Has the will been tampered with? Is there handwriting on the will?
- Has a check been made for later wills?

Witnesses to the Will

As part of your application for probate you will need to make contact with the witnesses to the Will or demonstrate your attempts to contact them.

- Contact made with Witnesses

Documents to bring to your appointment

- Original Will and Codicils if any (a Codicil is a later amendment to the Will)
- Original death certificate
- Certificate of title for any real property the deceased may have owned
- Bank account names, numbers and balances at the date of death
- Share details (company name, number of shares, where registered and value)
- Superannuation details
- Full details of any debts or unpaid bills the deceased may have had at the date of death
- Details of any other asset or liability the deceased may have had and their value at the date of death