

## PROBATE EXPRESS

# Client Information Form

### INTRODUCTION

This form is a guide to the issues that are considered as part of the estate administration process and the information we require to prepare an application for a grant of probate or letters of administration.

### YOUR DETAILS

Provide a copy of your licence or other identification

Title                      Mr                      Mrs                      Ms                      Miss                      Dr

Full name

Email address

Street Address

Suburb/City

State

Postcode

Postal Address:  
*(if different from above)*

Suburb/City:

State

Postcode

Contact Numbers:    (h)

(m)

Date of Birth

Relationship with the Deceased

### DECEASED'S DETAILS

Title                      Mr                      Mrs                      Ms                      Miss                      Dr

Full name

Was the Deceased known by any other names?

Date of Birth

Date of Death

Last Residential Address

*(if different from address in will, how long has deceased lived at the later address?)*

yrs

Tax File Number

Current accountant (if any)

Marital Status

Married

De-facto

Divorced

Widowed

Single

Full Name of Spouse *(if applicable)*

## DEATH CERTIFICATE

Has a death certificate issued?

Yes - provide a copy by email

Do you have the original?      Yes      No

If no, who holds it?

No - provide a copy by email once received and the original will be required

## LAST WILL

Did the deceased leave a will?

**Yes**- provide copy by email

- a. Date of will
- b. Location of original will
- c. If you do not hold it – Executor/s to sign [Authority to Release Documents form](#)
- d. Details of Executors

Executor 1

*Insert "as above" if you are an executor*

Executor 2

Executor 3

Executor 4

- e. Any other documents containing testamentary wishes - letters/notes/unsigned wills?

**No**

Download a factsheet on Intestacy [here](#)

## DECEASED'S ASSETS

Ensure all assets are safe, secure and insured

Asset Description	Approximate Value
<b>Jointly held</b> e.g. the family home, household contents etc.	
<b>Individually held</b> e.g. bank accounts, shares etc.	
<b>Other assets</b> e.g. discretionary trusts etc.	
<b>Superannuation</b> e.g. industry fund or Self-Managed Super Fund	
<b>Life Insurance</b> e.g. company, policy number/owner, life insured, beneficiary	
<b>Debts owed to the deceased</b> e.g. are there any personal loans to be repaid?	

## DECEASED'S DEBTS/LIABILITIES

Description	Approximate Value

## GENERAL COMMENTS

General comments about the deceased or the administration of the estate.

Indicate what steps you would like us to take:

Only obtain probate/letters of administration

Obtain probate/letters of administration and collect funds

I would like to arrange a meeting to discuss the administration of the estate

Unsure – provide your most convenient telephone number and we can ring you to discuss

## NEXT STEPS

1. Email completed form to **probateexpress@mcw.com.au**
2. We will email/telephone you to confirm receipt and clarify any necessary details
3. Once we hold all necessary documents and information we will:
  - Forward confirmation of instructions and costs agreement to you to sign
  - Prepare the relevant documents
  - Arrange for documents to be signed and advertising to be done.

**If you have any further questions, please contact**

### **Fred Smith**

*Principal, Queensland*

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