

PA1P — Probate application

This form is for an application where the person who has died left a will

Checklist – before you send your application form to the probate registry you will need to enclose the following. This checklist must be completed. If you do not enclose all of the required documents it will delay your application. Please keep copies of all documents that you send.

- ☐ PA1P - Probate Application (this form) - where a person who has died has left a will.
- ☐ Inheritance Tax Summary Form: Please submit the appropriate form (IHT205 or IHT207, and IHT217 if applicable), signed by all applicants (see additional notes in Section 7).
- ☐ The original will and any codicils (Signed by each of the persons named in Section A. See Checklist Note).
- ☐ Two plain (not certified) unstapled A4-sized copies of the will and any codicils.
- ☐ A copy of any foreign wills or any wills dealing with assets held outside England and Wales (and if not in English, an English translation).
- ☐ An official copy (**not** a photocopy) of the death certificate, or a coroner's interim certificate of the person who has died.
- ☐ Any other documents requested on this form. Please list them:

As well as the application fee, there is a fee for each official copy of the Grant of Representation that we provide.

How many official copies of the Grant of Representation do you require for use **in** the United Kingdom?

How many official copies of the Grant of Representation do you require for use **outside** of the United Kingdom?

Application fee

£

Fees for copies

£

Total fees

£

- ☐ Debit or Credit card. (This payment must be made before you send your application and the payment reference entered in the box below .)

Payment reference

- ☐ A cheque/postal order payable to '**HMCTS**' in respect of HMCTS's fees. Please write the name of the person who has died on the back of the cheque.

Checklist note – the original and any codicils to the will must be signed by each of the persons named in Section A. You must sign at the very top of the first page of the will and any codicils before any of the writing of the will.

Do not attach anything to or remove anything from the original will/codicils. Also, make sure that you keep a copy for yourself.

Details of how to pay by debit or credit card can be found in the additional information provided with this form.

SECTION A – PERSONAL INFORMATION

1. About the applicant(s) – All applicants must be over 18 years and a maximum of 4 may apply

1.1 Title and full name including middle names of **first applicant**

1.2 Is your name different in the will and codicil?

☐ Yes, give the name as it appears in the will or codicil in the box below

☐ No

1.3 Your address

Postcode

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1.4 Your home telephone number

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1.5 Your mobile/work telephone number

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1.6 Your email address

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1.7 Title and full name including middle names of **second applicant**

1.8 Is their name different in the will and codicil?

☐ Yes, give the name as it appears in the will or codicil in the box below

☐ No

Please complete in BLOCK capitals placing a tick in boxes where applicable.

Note 1.1 –

all correspondence, including the Grant of Representation, will be sent to the first applicant named in this section.

Only list applicants who wish to be named on the grant in this section they will be required to sign this document. Please note that the names you provide here must match the names provided on your formal ID. E.g. passport or Driving licence.

When there are no executors applying and there are persons aged under 18 benefiting from the estate then two applicants (or at least two) will be needed in Section A. You may wish to contact your local Probate Registry to seek information in regard to who is eligible to apply.

Note 1.6 – we will contact you with any queries via this email address.

We aim to contact you within 10 working days of receipt of your application.

1.9 Their address

Postcode

1.10 Title and full name including middle names of **third applicant**

1.11 Is their name different in the will and codicil?

☐ Yes, give the name as it appears in the will or codicil in the box below

☐ No

1.12 Their address

Postcode

1.13 Title and full name including middle names of **fourth applicant**

1.14 Is their name different in the will and codicil?

☐ Yes, give the name as it appears in the will or codicil in the box below

☐ No

1.15 Their address

Postcode

1.16 Was the person who has died or any of their relatives legally adopted in or out of the family?

- ☐ Yes, **see note 1.16**
- ☐ No

Note 1.16 – If you answered Yes to this question we will require additional information to be submitted with your application.

Please email
Probateapplications@
justice.gov.uk or call 0117
9302430 and quote 'Adoption'
to obtain the additional
documents required. This
document must be submitted
with this application. If you do
not then this may delay this
application.

SECTION B

The information you provide in this section of the application form will be the basis of your statement of truth, and it will be stored as a public record.

2. About the person who has died

2.1 Forename(s) (including all middle names) as they appear on the Death Certificate

2.2 Surname as it appears on the Death Certificate

2.3 Permanent address

Postcode

2.4 Date they were born

2.5 Date they died

2.6 Was the person who has died known by any other name in which they held assets?

- ☐ Yes, go to question 2.7
- ☐ No, go to question 2.8

2.7 Please give the details of any other names by which the person who has died held assets.

Full name

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2.8 Did the person who died live permanently in England and Wales at the date of death, or intend to return to England and Wales to live permanently (this is domicile)?

☐ Yes

☐ No

2.9 What was the marital status of the person who has died when they died?

☐ Never married

☐ Widowed, their spouse or civil partner having died before them

☐ Married/in a civil partnership - give date

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☐ Divorced/civil partnership is dissolved - give date

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☐ Judicially separated - give date

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2.10 What is the name of the court where the Decree Absolute, Decree of Dissolution of Partnership or Decree of Judicial Separation was issued?

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2.11 Did the person who has died own any foreign assets?

☐ Yes, the total value of their foreign assets (not including houses or land)

£

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☐ No

Note 2.7 – These names must be ones that will appear on the grant because an asset is in that name. We do not need to know the asset.

Note 2.8 – Living permanently means they had a lasting connection with England and Wales such as having been born in England and Wales and retaining a home there. They may have lived abroad but planned to return to England and Wales to live permanently. For legal purposes this means they were domiciled in England and Wales. You may wish to seek legal advice about this.

Note 2.10 – a civil partnership is a same-sex relationship that has been registered in accordance with the Civil Partnership Act 2004. A marriage is a legal ceremony conducted in UK under the Marriage Acts 1949, 1994 and The Marriage (Same Sex Marriage) Act 2013 or a ceremony conducted in any other country by the law applicable there. Date of divorce - this date is on their Decree Absolute, Decree of Dissolution of Partnership or Decree of Judicial Separation. You can get an official copy of these documents from the court that issued them, or from The Divorce Absolute Search Section, Central Family Court, 42–49 High Holborn, London WC1V 6NP.

3. The will and any codicils – This section is about the will.
You must submit the original will and codicils, if there are any.

3.1 Have all the persons named in section A signed the will and any codicils?

- ☐ Yes, **go to question 3.2**
- ☐ No, all persons named in Section A must sign the will and any codicils before you send off your application. If you do not then it will delay your application

3.2 Is the will dated before 4 April 1988?

- ☐ Yes
- ☐ No

3.3 Did the person who has died also leave any codicils?

- ☐ Yes, **please provide the original document(s) with your application**
- ☐ No

3.4 Did the person who has died have any wills that were made outside of England and Wales?

- ☐ Yes, **please provide a copy with your application; if it is not in English, you must provide a translation. If required by the court, you may need to supply an official copy at a later date.**
- ☐ No

Only answer this question if no executor to the will is applying

3.5 Is there anyone under 18 years old who receives a gift in the will or a codicil?

- ☐ Yes
- ☐ No

Note 3 – a will does not have to be a formal document. Please make sure you send the original will with your application. If you do not then this will delay your application.

If you have been unable to locate the original will and only have a copy and have made all reasonable attempts to locate the original. Please email Probateapplications@justice.gov.uk or call 0117 9302430 and quote 'Lost will' and we will supply additional information to help you proceed.

Note 3.1 – a codicil is a document that amends a will.

Note 3.5 – If you are not an executor but are applying on behalf of a beneficiary who is under 18 then two applicants will be needed in Section A.

3.6 Name any executors who are **not** making this application, and explain why.

Reasons for executors not applying:

A – They died before the person who has died.

B – They died after the person who has died (Please include the date they died by their name).

C – Power reserved: they have chosen not to apply, but reserve the right to do so later.

D – Renunciation: they have chosen not to apply, and give up all rights to apply. (Before you send off your application please **read NOTE REASON D**)

E – Power of attorney: they have appointed or wish to appoint another person to act as their attorney to take a Grant of Representation on their behalf (You will also need to complete Section 5 of this application). (Before you send off your application please **read NOTE REASON E**)

F – They lack capacity to act as executor.

Full name(s) of executor(s) not applying	A, B, C, D, E or F

Note 3.6 – Executors are the first person who can apply for a grant. We need to know why any executors aren't included in this application. This includes any executors who have pre-deceased. **If you do not provide all of the information this will delay your application.**

Reason C

If any executors are having power reserved, you **must** notify them of the application in writing. The Grant of Representation will only be issued to those people named as applicants in Section A.

Reason D

If you state that an executor has given up their right to apply. We will need to send another form to you to give to the executor, for them to sign. Please email Probateapplications@justice.gov.uk or call 0117 9302430 and quote 'Renunciation' and we will send the renunciation form.

You will need to send the renunciation form to us with this application.

Reason E

If you state that an executor wishes to appoint an attorney or they already have an attorney. We will need to send another form to you to give to the executor for them to sign, or you will need to provide one of the forms mentioned in Section 5.

Please email Probateapplications@justice.gov.uk or call 0117 9302430 and quote 'Attorney' and we will send the attorney form.

You will need to send the attorney form to us with this application. The attorney of one executor and an executor acting in their own right may not jointly apply for a Grant of Representation.

Reason F

If you state that an executor lacks capacity and are incapable of managing their property and financial affairs, when we receive this application we may send a medical certificate for the executors' doctor to sign. If you do not already have medical evidence from a qualified practitioner or are using a registered LPA a short form of medical evidence will be required.

Please note that the originals of the will and any codicils must be signed by each of the persons named in Section A. You must sign at the very top of the first page of the will before any of the writing of the will or codicil.

- 3.7** ☐ The undersigned declare that written notice has been given to all executors who have power reserved to them and are not making this application.

If you fail to give written notice, it is likely to delay your application.

- 3.8** Did you separate the will for photocopying purposes?

- ☐ Yes - please explain the details in the box below including who separated it, when they did and why they did it.

- ☐ No

- 3.9** Can you confirm the will consisted of the pages now being submitted and no other pages or documents of a testamentary nature or other nature were attached.

- ☐ Yes

- ☐ No

4. Relatives of the person who has died

4.1 Did the person who has died leave a surviving spouse or civil partner?

- ☐ Yes
- ☐ No

4.2 How many of the following blood and adoptive relatives did the person who has died have?

	Under 18 years	Over 18 years
a How many sons or daughters of the person who died survived them?		
b How many sons or daughters of the person who has died who did not survive them?		
c How many children of people at 'b' who survived them?		

4.3 Please state the relationship of each of the persons applying for the grant to the person who has died. (If you are applying as an attorney for someone then please state attorney)

Relationship description

First applicant

Second applicant

Third applicant

Fourth applicant

Note 4.1 – ‘survive’ means that they were alive when the deceased person died.

Note 4.2 – Please state the **number** of relatives the person who has died had in the relevant sections. If none then put nil or strike through.

5. Applying as an attorney

5.1 Are you applying as an attorney on behalf of one or more people who are entitled to apply for a Grant of Representation?

☐ Yes, **go to question 5.2**

☐ No, **go to section 6**

5.2 Please give the full names of the person or people on whose behalf you are applying.

5.3 Please give their address

Postcode

5.4 Is a person on whose behalf you are applying unable to make a decision for themselves due to an impairment of or a disturbance in the functioning of their mind or brain?

☐ Yes, further confirmation of this will be requested by the Probate Registry.

☐ No

5.5 Has anyone been appointed by the Court of Protection to act on behalf of a person on whose behalf you are applying?

☐ Yes, **please provide an official copy of the court order with your application**

☐ No

5.6 Has a person on whose behalf you are applying appointed an attorney under an Enduring Power of Attorney (EPA) or a Property and Financial Affairs Lasting Power of Attorney (LPA)?

☐ Yes, **please provide the original EPA/LPA (or a solicitor's certified copy of it certified on every page.) with your application**

☐ No, **go to Section 6**

5.7 Has the Enduring Power of Attorney (EPA) been registered with the Office of the Public Guardian?

☐ Yes

☐ No

Note 5 – if you are applying on behalf of more than one person, please provide the information requested in this section for the other people you represent on a separate sheet of paper. We will need to send another form to you to give to the executor for them to sign, or you will need to provide one of the forms mentioned in this section.

Please email Probateapplications@justice.gov.uk or call 0117 9302430 and quote 'Attorney' and we will send the attorney form.

You will need to send the signed attorney form to us with this application. The attorney of one executor and an executor acting in their own right may not jointly apply for a Grant of Representation.

Where there are persons aged under 18 benefiting from the estate then two applicants (or at least two) will be needed in Section A. You may wish to contact your local Probate Registry to seek information in regard to who is eligible to apply.

Note 5.4 – this applies if they lack capacity under the Mental Capacity Act 2005 and are incapable of managing their property and financial affairs. You may wish to seek legal advice about this.

If you do not already have medical evidence from a qualified practitioner or are using a registered LPA a short form of medical evidence will be required.

Please email Probateapplications@justice.gov.uk or call 0117 9302430 and quote 'medical evidence' and we will send the form.

Note 5.6 – an LPA must be registered with the Office of the Public Guardian before it can be used.

6. Foreign domicile

Note – if you answered Yes, to question 2.8 you don’t need to complete this section – please go to Section 7.

6.1 What was the country where the person who died either lived permanently at the date of death or intended to return to live permanently?

6.2 What does the estate in England and Wales of the person has died consist of?

Assets	Values

6.3 Has an entrusting document, a succession certificate or an inheritance certificate been issued in the country of domicile of the person who has died?

- ☐ Yes, **please provide the document with your application; if it is not in English, please also provide a translation**
- ☐ No

Note 6.3 – these documents may help to support your application. If you do not have any of these documents, you may wish to seek legal advice.

7. Inheritance tax

7.1 Did you complete an Inheritance Tax Estate report online?

- ☐ Yes, do not submit an Inheritance Tax form with this application

Please provide the following details, **then go to Section 8**:

IHT Identifier

Gross Estate Figure

£

Net Estate Figure

£

- ☐ No, **go to question 7.2**

7.2 Which of the following inheritance tax forms have you completed?

- ☐ Form **IHT205**, **complete 7.3 then go to Section 8**
- ☐ Form **IHT207**, **complete 7.4 then go to Section 8**
- ☐ Forms **IHT400** and **IHT421**, **complete 7.5 then go to Section 8**

7.3 Provide the following figures from form **IHT205**.

Figure from box D

£

Figure from box F

£

(This figure will determine the probate application fee (See PA3))

7.4 Provide the following figures from form **IHT207**.

Figure from box A

£

Figure from box H

£

(This figure will determine the probate application fee (See PA3))

7.5 Provide the following figures from form **IHT421**.

Figure from box 3

(Gross value of assets)

£

Figure from box 5

(Net value)

(This figure will determine the probate application fee (See PA3))

£

Note 7 – if you completed an Inheritance Tax Summary online, and fully complete question 7.1 of this form, you do not need to send an Inheritance Tax Estate report form with your application.

Note 7.2 – if you did not complete an Inheritance Tax Estate report online, you **must** complete IHT205, or IHT207, or both IHT400 and IHT421.

Note 7.3 – if the person who has died, died before 1 September 2006, it may affect which tax form you need to complete, so please ring the **Probate Helpline** on **0300 123 1072**.

Note 7.5 – do **not** send form IHT400 or form IHT421 to us. Please send them to HM Revenue and Customs, Inheritance Tax, BX9 1HT, at the same time you send PA1 and other papers to the District Probate Registry. HMRC will stamp your IHT421 and send it to the District Probate Registry you named on your IHT421.

LEGAL STATEMENT

The undersigned confirm to administer the estate of the deceased according to law and will:

- Collect the whole estate
- Keep full details (an inventory) of the estate
- Keep a full account of how the estate has been distributed

If the Probate Registry (court) asks the undersigned they will:

- Provide the full details of the estate and how it has been distributed
- Return the grant of representation to the court

and understand that:

- The application will be rejected if the information is not provided (if asked)
- Criminal proceedings for fraud may be brought against the undersigned if it is found that the evidence provided is deliberately untruthful or dishonest

The undersigned confirm to administer the estate of the person who has died in accordance to law, and that the application is truthful.

ALL PERSONS APPLYING FOR THE GRANT (those listed in Section A) MUST SIGN BELOW AND THE FRONT OF THE WILL.

Signature of first applicant

Date signed

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Signature of second applicant

Date signed

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Signature of third applicant

Date signed

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Signature of fourth applicant

Date signed

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NOTE: Please refer back to the checklist on page 1 and ensure you have all the documents you need to send. Also make sure that every person named in Section A has signed the will and any codicils. You must sign at the very top of the first page of the will and any codicils before any of the formal writing. You do not need to date this signature.

FOR OFFICE USE ONLY

How are the applicants entitled to apply.

In what capacity are the persons applying entitled to apply?

- ☐ The executor/s named in the will/codicil of the person who has died
- ☐ The Attorney/s acting on behalf of the executor/s named in the will/codicil of the person who has died
- ☐ Beneficiary/s named in the will/codicil of the person who has died
- ☐ The Attorney/s acting on behalf of the beneficiary/s named in the will/codicil of the person who has died
- ☐ Other (Please state in the box below the reason they are applying)