

Client full name and occupation	
Date of Death copy of certificate required	
Date of Birth	
Date of Marriage	
Address of Tax Office	
Tax Ref No	
Nat Ins No	
Address of Client	
Value of House	
Life Policies and values Policies required	
Bank Accounts and values Statements required Addresses required	
Building Society Accounts and Values Addresses required Statements required	
Shares Certificates required	

Joint Assets Details and values required with statements	
Pensions State and Private Names and Addresses of providers	
Any other info I.e. Trusts Original of Will	Original Will required please