

DEBENHAMS OTTAWAY
SOLICITORS

5. Please briefly summarise who benefits under the Will and in what amount/proportion:

6. Are you aware of any earlier Will(s) or Will(s) that has been lost? Yes No Don't know

7. Has a Grant of Probate or a Grant of Letters of Administration been issued? Yes No Don't know

If 'Yes', please give the date of the Grant: / /

8. What is the net value of the estate (found towards the bottom of the Grant) or if there is no Grant yet, what is your estimate of the total net estate? £.....

Will validity claim

9. If you are questioning the validity of the Will, please circle the reason(s) why from the list below:

- The person who made the Will lacked testamentary (mental) capacity to make the Will
- The person who made the Will did not do so under their own free will
- The person who made the Will lacked knowledge and approval of the contents of the Will
- The person who made the Will was not 18 years of age or above
- The Will was not signed in the joint presence of two witnesses
- The Will is believed to be a forgery
- The Will was made following a fraud

10. Has a caveat been registered? Yes No Don't know

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Inheritance (Provision for Family & Dependents) Act 1975 claim

11. Are you thinking of bringing a claim because you are not a beneficiary, or receive less than you consider reasonable in all the circumstances? Yes No Don't know

12. What is your relationship to the person who has died? (please circle):

- husband or wife or civil partner of the deceased?
- former husband or wife or civil partner of the deceased?
- a child of the deceased?
- a person who was treated by the deceased as a child of the family? e.g. step-child
- a person who immediately before death were financially looked after by the deceased
- a person who during the two years ending immediately before deceased died, was living in the same household as the deceased as their husband, wife or civil partner.

13. Would you consider alternative means of resolving your dispute, for example mediation? Yes No Don't know

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15. On a separate sheet please draw a family tree including names and dates of births, marriages, divorces, deaths so far as known.

Thank you for completing this questionnaire.

(for internal use)

Client ref:

ID:

Conflict Search:

Limitation: