



PLEASE ANSWER ALL APPLICABLE QUESTIONS IN FULL

| | |
|--|--|
| The Estate of the late (full name of the person who has died): | |
| Your full name: | |
| Your Address: | |
| Your Telephone Number: | |
| Your Email Address: | |
| Death certificate received? | <input type="checkbox"/> YES <input type="checkbox"/> NO |

Please provide a copy of the death certificate with this form.

Any Executors who want to collect the document(s) must sign below

I/We request that you release the below documents, that you hold on behalf of the above-named deceased, to me/us as Executor(s) of the estate:

| | |
|-------------------|--|
| Executor 1 | Signed: Print Name: Dated: |
| Executor 2 | Signed: Print Name: Dated: |
| Executor 3 | Signed: Print Name: Dated: |
| Executor 4 | Signed: Print Name: Dated: |

DOCUMENTS TO BE RELEASED

| | |
|--|---|
| Please tick the appropriate box: | <input type="checkbox"/> All Wills <input type="checkbox"/> All Powers of Attorney (Enduring or Lasting) <input type="checkbox"/> Other (please provide details) |
| Is there more than one Executor? | <input type="checkbox"/> YES <input type="checkbox"/> NO If no, you have finished this page. Please sign on page 1. |
| Are ALL of the executors collecting the documents? | <input type="checkbox"/> YES - ALL executors must sign on page 1. <input type="checkbox"/> NO - ONLY <u>collecting</u> executors must sign on page 1. Continue to the next question. |
| If no, why aren't they collecting? | Tick ALL that apply: <input type="checkbox"/> It is inconvenient for them to attend the office - <u>complete Option A</u> (page 3). <input type="checkbox"/> They have renounced - <u>complete Option B</u> (page 4). <input type="checkbox"/> They have died - <u>complete Option C</u> (page 4). |

One or more Executors not collecting the documents

When there is more than one Executor named in the Will, and not all Executors will be collecting the documents, BakerLaw LLP requires authority from ALL living Executors to release original documents to you. Please complete the relevant signed authority (below) for each Executor who will NOT be collecting the documents.

OPTION A:

Authority to Release from non-collecting Executor

Non-collecting Executor 1:

I am one of the Executors named in the Will of the above-named deceased and authorise and request Baker Law LLP to release the documents requested above, held on behalf of the above named deceased, to the above-named executor/s.

Signed:

.....

Print Name:

.....

Dated:

.....

Non-collecting Executor 2:

I am one of the Executors named in the Will of the above-named deceased and authorise and request Baker Law LLP to release the documents requested above, held on behalf of the above named deceased, to the above-named executor/s.

Signed:

.....

Print Name:

.....

Dated:

.....

Non-collecting Executor 3:

I am one of the Executors named in the Will of the above-named deceased and authorise and request Baker Law LLP to release the documents requested above, held on behalf of the above named deceased, to the above-named executor/s.

Signed:

.....

Print Name:

.....

Dated:

.....

OPTION B:

Confirmation of Renunciation of non-collecting Executor(s)

I/we confirm that the Executor(s) who will not be collecting original documents from Baker Law LLP has/have renounced their executorship under the Will.

I/we enclose copies of the relevant Renunciation(s) for your information.

OR

Renouncing Executors have signed option A.

OPTION C:

Deceased Executor(s).

I/we confirm that the Executor(s) who will not be collecting original documents from Baker Law LLP has/have died.

I/we enclose copy death certificates for all deceased executors for your information.

| | |
|----------------------------|------------------|
| Deceased Executor 1 | Full name: |
| Deceased Executor 2 | Full name: |
| Deceased Executor 3 | Full name: |

Identification Requirements

All living Executors must provide:

- One item from list A.
- One item from list B.

List 'A' (to confirm name/identity)

- Current full signed passport
- Current UK photo card driving licence (full or provisional)
- HMRC tax code notification
- Original notification letter from DWP/Benefits Agency confirming rights to benefits

List 'B' (to confirm address)

- Current council tax bill
- Bank/building society/credit union passbook or statement not more than 3 months old showing current address
- Current UK photo card driving licence (full or provisional)
- Local council rent card or tenancy agreement
- Utility bill (NOT RELATED TO MOBILE PHONE) – not more than 3 months old
- Most recent original mortgage statement from a recognised lender
- Original notification letter from DWP/Benefits Agency confirming right to benefits

Next Steps:

1) Send us any of the following that apply:

- **This form (completed)**
- **Copies of ID for all living Executors**
- **Copy Renunciations for non-collecting Executors**
- **Copy death certificates for deceased Executors**

2) We will then contact you (within 10 working days) to arrange an appointment for you to collect the documents from our office.

3) At the appointment we will provide you with the original document(s) and you will be asked to sign a receipt.

Checklist:

- Page 1: completed and signed by all collecting Executors
- Page 2: completed
- Pages 3 & 4: Options A, B or C completed and signed for all non-collecting Executors.
- Copy Renunciations and/or Death Certificates enclosed
- Copy ID enclosed for ALL living Executors of the estate.

Please return this form to us by either email to
documentrelease@baker-law.co.uk

or by post to

Private Client Document Release
BakerLaw LLP, Gostrey House,
Farnham, Surrey, GU9 7PT

We will review your form and contact you within 10 working days.