Free Review - Probate

Completion of a Free Review for probate is required.  The best placed team member at View Legal will be in contact via email with the next step for you and your customer to implement the appropriate solution based on information provided.

View Community members have unlimited access to decision matrices and other toolkits to assist with determining the most likely pathway for each customer’s unique situation, while ensuring value is appropriately positioned for your business.  Log in to your dashboard [here](https://comviewnities.com/adviewser/) to access your resources.

Please note this form is to be used as a checklist and is for collection of data only. To submit a Free Review, please input the required data via the link [here](https://viewlegal.com.au/probate-free-review/).

Contact details

Items showing \* are required fields

Firm name\*

|  |
| --- |
|  |

Adviser contact name\*

|  |  |
| --- | --- |
|  |  |
| First  | Last |

Adviser email address\*

|  |
| --- |
|  |

Adviser phone number\*

|  |
| --- |
|  |

Are you an accredited adviser with View Legal?\*

|  |  |
| --- | --- |
|  | Yes |
|  | No |

Deceased details

Name of the deceased

|  |  |  |
| --- | --- | --- |
|  |  |  |
| First  | Middle | Last |

Date of death (if known)

|  |
| --- |
|  |

Background information

Has the death certificate been obtained?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

Is there a will?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

Is it a View Legal will?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

Is the will held in View Legal’s secure storage?

|  |  |
| --- | --- |
|  | Yes |
|  | No |
|  | Unknown |

Have any codicils been prepared?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

If yes, is the codicil/s held in View Legal secure storage?

|  |  |
| --- | --- |
|  | Yes |
|  | No |
|  | Unknown |

Is there any other documentation that informs the interpretation of the will (for example a memo of directions, letter of wishes or statutory declaration)

|  |  |
| --- | --- |
|  | Yes |
|  | No |

Is this document/s held in View Legal secure storage?

|  |  |
| --- | --- |
|  | Yes |
|  | No |
|  | Unknown |

Please provide a summary of the assets and liabilities of the deceased, including details of any bank accounts, insurance policies and superannuation

|  |
| --- |
|  |

Are there any institutions controlling assets that have requested probate (for eg Bank)?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

If yes, please provide details

|  |
| --- |
|  |

Are there any properties owned by the deceased at the date of death?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

Do you have a copy of the title search of the properties?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

If yes, please provide a copy of the title search for each property

If no, would you like View to arrange obtaining a copy of the title search for each property? Costs are [here](https://viewlegal.com.au/title-search-pricing/)

|  |  |
| --- | --- |
|  | Yes |
|  | No |

If yes, please provide as much detail as possible, for eg exact street address, Certificate of Title or other details usually on a rates notice

|  |
| --- |
|  |

Are there any related entities (eg. trusts or companies) the deceased was involved with?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

If yes, please provide details

|  |
| --- |
|  |

Are there any circumstances of the executor/s of the estate being unwilling or unable to act in the administration of the estate? For example, their solvency status or whether they are under a legal disability?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

If yes, please provide details

|  |
| --- |
|  |

Was the deceased known via any other aliases with third parties or on any other legal documents?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

If yes, please provide details

|  |
| --- |
|  |

Are there any people who could potentially be dissatisfied with the distribution of the estate and might seek to challenge the estate?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

If yes, please provide details

|  |
| --- |
|  |

Is there any other background material or information you believe may be relevant, other than what you have provided?

|  |  |
| --- | --- |
|  | Yes |
|  | No |

If yes, please provide details

|  |
| --- |
|  |

Documents

Please provide copies of:

1. Will and any codicils (if not held by View Legal);
2. Death certificate (if available);
3. Any correspondence from institutions that have requested probate;
4. Any bank account statements, insurance policies and superannuation statements; and
5. Source documents for any connected entities (for example trust and superannuation fund deeds (and any variations), ASIC extracts, constitutions and title searches or rates notices)

Note: If file size is greater than 50MB please use your preferred secure file share service to send documents to solutions@viewlegal.com.au