



**DUAL ASSET UNDERWRITING
COMPREHENSIVE EXECUTOR & INHERITANCE PROTECTION INSURANCE
APPLICATION FORM**

Section 1 – Please Complete

Full Name of Deceased	
Date of Death	
Legal Status (please tick one)	Intestate Testate
Estate Value	
Name/s of Personal Representative / Administrator / Executor and their address	

Section 2 – Please complete this section if the Deceased died Testate

Being in possession of the Deceased's will, I can confirm the following statements (please delete as appropriate):

a) There is no information to suggest, and no allegation has been made, that there may be a subsequent will	Confirmed Not Confirmed
b) There has been a search for a will at the Deceased's home, their bank and last place of residence (including care homes) since their death and no evidence of the Deceased having made a later dated will has been found	Confirmed Not Confirmed
c) I have seen what I believe to be the Deceased's only possessions and legal papers and found no evidence of another will	Confirmed Not Confirmed
d) The Deceased was not known to have suffered from a mental illness (including dementia) at the time they made their will	Confirmed Not Confirmed
e) There is no information to suggest a gift or legacy in the Deceased's will may be challenged by a third party	Confirmed Not Confirmed
f) I have checked with any charity named in the will and they have confirmed there are no third party challenges to their legacy	Confirmed Not Confirmed

Section 3 – Please complete this section if the Deceased died Intestate

The Deceased, having died Intestate, I can confirm the following statements (please delete as appropriate):

(a) There has been a search for a will at the Deceased's home, their bank and last place of residence (including care homes) since their death, and no evidence of the Deceased having made a will, has been found	Confirmed Not Confirmed
(b) I have seen what I believe to be the Deceased's only possessions and legal papers and found no evidence of a will	Confirmed Not Confirmed
(c) A Certainty National Wills Search (www.certainty.co.uk/findawill/home/index.ashx) has been made and no will relating to the Deceased has been located	Confirmed Not Confirmed
(d) There is no information to suggest and no allegation has been made, that the Deceased may have made a will	Confirmed Not Confirmed

Section 4 – Please Complete

I can confirm the following statements (please delete as appropriate):

(a) To the best of my knowledge, I am unaware of any dispute or claim concerning the Deceased's estate from any person / financial dependant / company / charity / sports or social club/ creditor	Confirmed Not Confirmed
(b) All beneficiaries who may be entitled to inherit have been traced and there are no known missing beneficiaries who are entitled to all or part of the Deceased's estate	Confirmed Not Confirmed
(c) If there are believed to be missing beneficiaries who may be entitled to inherit, these missing beneficiaries have not been in contact for at least five years prior to the Deceased's death and their current whereabouts are unknown	Confirmed Not Confirmed
(d) If there are believed to be missing beneficiaries, there are no outstanding enquiries in order to locate the missing beneficiaries and no further research has been recommended by a firm of genealogists, if they have already been instructed regarding this matter	Confirmed Not Confirmed
(e) If there are believed to be missing beneficiaries, They are not a child, sibling, parent or spouse of the Deceased	Confirmed Not Confirmed
(f) A Trustee Act Notice or advertisement has not been placed. If one has been placed then a period of at least 6 weeks has passed, from when they were placed	Confirmed Not Confirmed
(g) I confirm that the Deceased was domiciled in the United Kingdom at the time of their death. (NB: If the Deceased died overseas, but was domiciled in United Kingdom, then you can still buy an Executor & Inheritance Protection Insurance Policy)	Confirmed Not Confirmed

Please provide any other additional information

Completing the Application Form – PLEASE READ

This application should be completed by either:

- a) The person taking out the Grant of Representation, being the administrator or executor of the Deceased's estate, known as "the Personal Representative"; or
- b) The Personal Representative's appointed lawyer, accountant or insurance broker, acting with the Personal Representative's full authority and knowledge.

If you believe the Deceased had a family solicitor and / or there is evidence the Deceased had used a different firm of solicitors in the last ten years, and / or used another professional, such as an accountant or will writer, you must speak to that person before completing this form. You must also make reasonable enquiry of those close to the Deceased, particularly those who spent time with the Deceased at the end of their life.

If you have any queries, please visit the website or contact the team for more information:

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