PROBATE – BACKGROUND INFORMATION

**FOR THE PREPARATION OF PROBATE DOCUMENTS**

**DATE RECEIVED:** …………………………………………

**DECEASED DETAILS:**

Family Name …………………………………… 🞎 Mr 🞎 Mrs 🞎 Miss 🞎 Ms 🞎 Other ……………...…

Given Names …………………………………………………………………………………………….……….

Known by any other name ……………………………………………………………………………………....

Last place of residence .…………………………………………………………………………………………

………………………………………………………………………………………………………………………

Marital Status: 🞎 Married 🞎 Single 🞎 Other ……………..……….……………………………….

 (eg de facto, separated, divorce, engaged, widowed)

Occupation ………………………………………………………

Occupation followed during life …………..…………………………………………………………………..…

Name of Employer …………...………………………………………………………………………………..…

Date of retirement ………………………………………………………………………………………………..

War service………………………………………………………………………………………………………..

Date of Birth ……………………………………………. Place of Birth ……………………………………….

Date of Death .….………………………………………Place of Death ……………..………………………..

On whose property did

Testator reside …………………………………………….…….………………..………….……………….…

Date of Will:…………………………………… Location of Will ……………………………………………….

Address in Will .……………………………...……………………………………………………………………

………………………………………………………………………………………………………………………

**PARTICULARS OF EXECUTORS** (all of age?)

Family Name …………………………………… 🞎 Mr 🞎 Mrs 🞎 Miss 🞎 Ms 🞎 Other ……………...…

Given Names …………………………………………………………………………………………….……….

Known by any other name ……………………………………………………………………………………....

Address .……………………………………………………………………………………………………….…

………………………………………………………………………………………………………………………

Email ………………………………………………………………………………………………………………

Telephone ……………………………..….. Occupation ………………………………………………………

Date of Birth ……………………………………………. Place of Birth ……………………………………….

Relationship to the Deceased ……………………………………………………………………………..

Family Name …………………………………… 🞎 Mr 🞎 Mrs 🞎 Miss 🞎 Ms 🞎 Other ……………...…

Given Names …………………………………………………………………………………………….……….

Known by any other name ……………………………………………………………………………………....

Address .……………………………………………………………………………………………………….…

………………………………………………………………………………………………………………………

Email ………………………………………………………………………………………………………………

Telephone ……………………………..….. Occupation ………………………………………………………

Date of Birth:……………………………………………. Place of Birth ……………………………………….

Relationship to the Deceased ……………………………………………………………………………..

Family Name ………………………………… 🞎 Mr 🞎 Mrs 🞎 Miss 🞎 Ms 🞎 Other ……………...…

Given Names ……………...…………………………………………………………………………….……….

Known by any other name …………………………………………………………………………………....

Address .……………………………………………………………………………………………………….…

………………………………………………………………………………………………………………………

Email ………………………………………………………………………………………………………………

Telephone ……………………………..….. Occupation ……………………………………………………

Date of Birth …………………………………………. Place of Birth ……………………………………….

Relationship to the Deceased …………………………………………………………………………..

Family Name …………………………………… 🞎 Mr 🞎 Mrs 🞎 Miss 🞎 Ms 🞎 Other ……………...…

Given Names ………………………………………………………………………………………….……….

Known by any other name …………………………………………………………………………………....

Address .……………………………………………………………………………………………………….…

………………………………………………………………………………………………………………………

Email ………………………………………………………………………………………………………………

Telephone ……………………………..….. Occupation ……………………………………………………

Date of Birth …………………………………………. Place of Birth …………………………………….

Relationship to the Deceased …………………………………………………………………………..

**PARTICULARS OF WITNESSES**

Witness 1 Name ……………………………………………………………………………………………

Address …………………………………………………………………………………………..…………

…………………………………………………………………………………………………………………

Occupation ………………………………………………………

Witness 2 Name ……………………………………………………………………………………………

Address …………………………………………………………………………………………..…………

…………………………………………………………………………………………………………………

Occupation ………………………………………………………

**PARTICULARS OF BENEFICIARIES** (all sui juris?)

Family Name: …………………………………… 🞎 Mr 🞎 Mrs 🞎 Miss 🞎 Ms 🞎 Other ……………...…

Given Names ………………………………………………………………………………………….………....

Known by any other name …………………………………………………………………………………......

Address .……………………………………………………………………………………………………….….

………………………………………………………………………………………………………………………

Email ………………………………………………………………………………………………………………

Telephone ………………….…………..….. Occupation ………………………………………………….…

Relationship to the Deceased …….……………………………………………………………………..

Full age and capacity ………………….………………………………………………………………….

…………………………………………………………………………………………………………………

Family Name: …………………………………… 🞎 Mr 🞎 Mrs 🞎 Miss 🞎 Ms 🞎 Other ……………...…

Given Names ………………………………………………………………………………………….………....

Known by any other name …………………………………………………………………………………......

Address .……………………………………………………………………………………………………….….

………………………………………………………………………………………………………………………

Email ………………………………………………………………………………………………………………

Telephone ………………….…………..….. Occupation ………………………………………………….…

Relationship to the Deceased …….……………………………………………………………………..

Full age and capacity ………………….………………………………………………………………….

…………………………………………………………………………………………………………………

Family Name …………………………………… 🞎 Mr 🞎 Mrs 🞎 Miss 🞎 Ms 🞎 Other ……………...…

Given Names ………………………………………………………………………………………….………....

Known by any other name …………………………………………………………………………………......

Address .……………………………………………………………………………………………………….….

………………………………………………………………………………………………………………………

Email ………………………………………………………………………………………………………………

Telephone ………………….…………..….. Occupation ………………………………………………….…

Relationship to the Deceased …….……………………………………………………………………..

Full age and capacity ………………….………………………………………………………………….

…………………………………………………………………………………………………………………

Family Name …………………………………… 🞎 Mr 🞎 Mrs 🞎 Miss 🞎 Ms 🞎 Other ……………...…

Given Names ………………………………………………………………………………………….………....

Known by any other name …………………………………………………………………………………......

Address .……………………………………………………………………………………………………….….

………………………………………………………………………………………………………………………

Email ………………………………………………………………………………………………………………

Telephone ………………….…………..….. Occupation ………………………………………………….…

Relationship to the Deceased …….……………………………………………………………………..

Full age and capacity ………………….………………………………………………………………….

…………………………………………………………………………………………………………………

Family Name …………………………………… 🞎 Mr 🞎 Mrs 🞎 Miss 🞎 Ms 🞎 Other ……………...…

Given Names ………………………………………………………………………………………….………....

Known by any other name …………………………………………………………………………………......

Address ……………………………………………………………………………………………………….….

………………………………………………………………………………………………………………………

Email ………………………………………………………………………………………………………………

Telephone ………………….…………..….. Occupation ………………………………………………….…

Relationship to the Deceased …….……………………………………………………………………..

Full age and capacity ………………….………………………………………………………………….

…………………………………………………………………………………………………………………

Family Name …………………………………… 🞎 Mr 🞎 Mrs 🞎 Miss 🞎 Ms 🞎 Other ……………...…

Given Names ………………………………………………………………………………………….………....

Known by any other name …………………………………………………………………………………......

Address .……………………………………………………………………………………………………….….

………………………………………………………………………………………………………………………

Email ………………………………………………………………………………………………………………

Telephone ………………….…………..….. Occupation ………………………………………………….…

Relationship to the Deceased …….……………………………………………………………………..

Full age and capacity ………………….………………………………………………………………….

…………………………………………………………………………………………………………………

**PROPERTY IN VICTORIA:**

*Real Estate:*

(insert Title and improvement details, value and where Title held)

Situated at ………………………………………………………………………………………………….

…………………………………………………………………………………………………………………

Value of property: $.............................................

Location of Certificate to Title ……………………………………………………………………………

Situated at ………………………………………………………………………………………………….

…………………………………………………………………………………………………………………

Value of property: $.............................................

Location of Certificate to Title ……………………………………………………………………………

Situated at ………………………………………………………………………………………………….

…………………………………………………………………………………………………………………

Value of property: $.............................................

Location of Certificate to Title ……………………………………………………………………………

**PERSONAL PROPERTY:**

*Land under lease or licence:*

……………………………………………………………………………………………………………………………………………………………………………………………………………………………………

…………………………………………………………………………………………………………………

*Rents accrued to date of death:*

…………………………………………………………………………………………………………………

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*Life Policies:*

 ……………………………………………………………………………………………………………………………………………………………………………………………………………………………………

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*Money in hand or house:*

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…………………………………………………………………………………………………………………

*Money in Bank:*

Bank ……………….……………………………..

Account No. ……………………………………… Branch ………………………..……………………..

Held in the name/s …………………………………………………………………………………………

Amount: $…………………………

Bank ……………….……………………………..

Account No. ……………………………………… Branch ………………………..……………………..

Held in the name/s …………………………………………………………………………………………

Amount: $…………………………

Bank ……………….……………………………..

Account No. ……………………………………… Branch ………………………..……………………..

Held in the name/s …………………………………………………………………………………………

Amount: $…………………………

*Mortgages:*

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*Debentures, Bonds or Inscribed Stock:*

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…………………………………………………………………………………………………………………

*Debts due to Deceased:*

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*Shares:*

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*Furniture:*

…………………………………………………………………………………………………………………

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…………………………………………………………………………………………………………………

*Watches, trinkets, jewellery, etc:*

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…………………………………………………………………………………………………………………

*Motor cars: (boats, caravans, etc) Registration Date:*

…………………………………………………………………………………………………………………

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…………………………………………………………………………………………………………………

*Salary, wages, superannuation, pension, long service leave:*

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*Interest in a deceased person's estate:*

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**DEDUCTIONS FROM GROSS ESTATE**

*Secured:*

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…………………………………………………………………………………………………………………

*Unsecured: (funeral, medical, hospital, household, etc)*

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*Income Tax: (copy of last Return required. Name of Tax Agent, if any)*

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