





Asset checklist

Asset	Provider	Amount	<input checked="" type="checkbox"/>
Banking and savings			
Current and savings accounts			
Cash in the home or safety deposit box			
ISAs (cash and stocks & shares)			
Premium Bonds or NS&I accounts			
Property and land			
Main home (owned fully or jointly)			
Second homes or holiday lets			
Buy-to-let or rental properties			
Land or agricultural assets			
Investments			
Shares or stocks			
Investment funds or portfolios			
Bonds or gilts			
Cryptocurrency or online investment platforms			



Asset	Provider	Amount	
Pensions and insurance			
Private or workplace pensions (especially those not already in payment)			
Life insurance policies (unless written in Trust)			
Pension lump sums due but unpaid			
Valuable possessions			
Cars or vehicles			
Jewellery			
Artwork, antiques, or collectibles;			
Electronics or high-value furniture.			
Business interests			
Sole trader businesses			
Partnership stakes			
Company shares or director positions			
Debts owed to the deceased			
Personal loans made to others			
Final wages or benefits not yet received			
Refunds due from service providers (e.g. utilities or tax)			



Asset	Provider	Amount	
Debts and liabilities			

Remember, debts and liabilities go in a separate section of the probate application.



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