

Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD
client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ SET LETTER { DATE \@ "d MMMM yyyy" } } {ref LETTER \@ "d MMMM yyyy" \ *
MERGEFORMAT }

{ IF { MERGEFIELD "FW_PROEXEC1_FWEXEC_1_CO" } = "" "{ MERGEFIELD
FW_PROEXEC1_FWEXEC_1_TITLE } { MERGEFIELD
FW_PROEXEC1_FWEXEC_1_FORE } { MERGEFIELD
FW_PROEXEC1_FWEXEC_1_SURN }" "{ MERGEFIELD
"FW_PROEXEC1_FWEXEC_1_CO" }
{ MERGEFIELD FW_PROEXEC1_FWEXEC_1_TITLE } { MERGEFIELD
FW_PROEXEC1_FWEXEC_1_FORE } { MERGEFIELD
FW_PROEXEC1_FWEXEC_1_SURN }"
{ MERGEFIELD "FW_PROEXEC1_FWEXEC_1_ADDR" }

Dear { MERGEFIELD "FW_PROEXEC1_FWEXEC_1_TITLE" } { MERGEFIELD
"FW_PROEXEC1_FWEXEC_1_SURN" }

**Estate of { MERGEFIELD "LINKNAME_FORENAME_1" } { MERGEFIELD
"LINKNAME_SURNAME_1" }**

I write further to your recent enquiry regarding the estate of { IF { MERGEFIELD
"FW_PROEXEC1_FWDCD_1_RSHP" } = "None" "the late { MERGEFIELD
"LINKNAME_FORENAME_1" } { MERGEFIELD "LINKNAME_SURNAME_1" }." "your late {
MERGEFIELD "FW_PROEXEC1_FWDCD_1_RSHP" }. I should firstly like to take the
opportunity to offer my sincerest sympathy and I hope that I can make things easier for you
at this difficult time." }

I confirm that an appointment has been made for you to see me on [*date and time*] at our
office at { MERGEFIELD "PRACTICEINFO_HOUSE" }, { MERGEFIELD
"PRACTICEINFO_POSTAL_TOWN" }, { MERGEFIELD "PRACTICEINFO_POSTCODE" }.

Please could you bring the following documents to the appointment:

1. Death certificates (generally one certificate per asset)
2. [Original will]
3. [House deeds]
4. Financial documents relating to all assets, including any jointly held assets (e.g. recent bank statements, passbooks, life policy documents, share certificates, bond certificates, investment valuations, premium bonds etc)
5. Documents relating to any liabilities (e.g. recent credit card statements, loan statements, mortgage account statements)
6. Any outstanding bills or details of any likely bills (e.g. funeral account, care home

- fees, utility bills)
7. Details of any private or occupational pensions
 8. The National Insurance Number for { IF { MERGEFIELD "FW_PROEXEC1_FWDCD_1_RSHP" } = "None" "the late { MERGEFIELD "LINKNAME_FORENAME_1"} {MERGEFIELD "LINKNAME_SURNAME_1" }" "your late { MERGEFIELD "FW_PROEXEC1_FWDCD_1_RSHP" }" }
 9. Full names and addresses of all beneficiaries of the Will
 10. Identification for you (i.e. (1) a passport or photo driving licence AND (2) a recent bank statement or utility bill)

It would be helpful if you could bring as many of the above documents to the appointment as possible. However, if you are unable to bring all of this, then it will be possible to bring it to the office at a later date.

At this stage you should ensure that the assets are kept secure i.e. [that the house is kept fully locked and alarmed (if appropriate), that you have informed the buildings insurers that the house is now unoccupied and] that any valuable and financial papers are in a safe place.

I look forward to seeing you at the appointment. Please let me know if you have any queries in the meantime.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }