

Name and address

Read the notes below before you fill in this box

Name
Address
Postcode

Notes

There are different procedures for applying for a grant of probate depending on who you are and where you apply for the grant.

If you are a solicitor

Either:

- enter your name and full postal address in the box above, or
- if you use the British Document Exchange (DX), type in or enter your DX address in capitals.

If you are filling in this form without the help of a solicitor

The action you take depends where you are taking out the grant:

- in England and Wales - leave the box above blank. Send this form with your form IHT400 Inheritance Tax account to HMRC Trusts and Estates Inheritance Tax (we will then send it to the Probate Registry where you are sending form PA1)
- in Northern Ireland - write your own name and address in the box above
- in Scotland - do not fill in this form. Please complete form C1 instead.

Inheritance Tax reference *if known*

Name of Probate Registry where you are sending form PA1

Leave this box blank if you are a Solicitor or are applying for a grant in Northern Ireland

Your reference (if applicable) and name of contact

Your phone number (in case we have a query)

About this form

Fill in this form if you are applying for a grant of representation in England, Wales or Northern Ireland. If you are in Scotland fill in form C1 to apply for a grant of confirmation instead.

Give details of the assets that became the property of the personal representatives. This will be the same property for which you are applying for a grant of representation.

Help

Please read the guidance notes *Applying for a grant* in the *IHT400 Notes* before filling in this form.

For more information or help:

- go to www.hmrc.gov.uk/inheritancetax
- go to www.justice.gov.uk
- phone our helpline on **0300 123 1072**
- if phoning from outside the UK, phone **+44 300 123 1072**.

Deceased's details *use capital letters*

Name

Title - enter Mr, Mrs, Miss, Ms or other title

Surname or family name

First name(s)

Date of death DD MM YYYY

Address

Postcode

House or building number

Rest of address, including house name or flat number

Where was the deceased domiciled at the date of death?

Summary

This is a summary for probate purposes only and will not necessarily include all the assets you have listed on the form IHT400 for Inheritance Tax purposes. It will not include:

- lifetime gifts
- foreign assets
- assets held in trust
- nominated assets
- gifts with reservation and pre-owned assets.

Estate in the UK before deductions <i>IHT400, box 79 + IHT404, box 13</i>	1	£ <input type="text"/>
Joint assets passing by survivorship <i>Copy amount from IHT404, box 11, total of column A</i>	2	£ <input type="text"/>
Gross value of assets for probate (box 1 minus box 2)	3	£ <input type="text"/> <i>See Note below</i>
Liabilities <i>IHT400, box 83 + box 84, + IHT404, box 12</i>	4	£ <input type="text"/>
Net value (box 3 minus box 4)	5	£ <input type="text"/> <i>See Note below</i>
Tax and interest paid on this account Copy amount from form: <ul style="list-style-type: none">• IHT400, box 117• IHT400 Calculation, box 64, or• IHT430, box 28 as appropriate. If there is no tax to pay enter '0'.	6	£ <input type="text"/>
Signature of person or name of firm calculating the amount due <input type="text"/>		
Date <i>DD MM YYYY</i> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		

Note

If you are a Solicitor

Copy the amounts in boxes 3 and 5 to the oath.

If you are filling in this form without the help of a solicitor

In England and Wales - copy the amounts in boxes 3 and 5 to form PA1 section E

In Northern Ireland please read instructions at www.courtsni.gov.uk

For HM Revenue & Customs use only

Inheritance Tax stamp <input type="text"/>
