

Smee & Ford

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Our Ref:1000/1231234

REPORT OF A NAMED BEQUEST

The Will of Jo Bloggs

aged 85

widow

of 1 The Street, Somewhere, London, N1 000

date of will 10/1/2018

The testator/ trix died on 29/1/2022 leaving

gross estate valued at £325,000

net estate value at £186,000

Not exceeding will now show the IHT limit as gross estate and the net estate will be the estimated value of the estate. Please also note that net amounts on not exceeding estates will be rounded up to the nearest £1,000 of the actual net amount left.

The Will was proved at:- The District Probate Registry at Newcastle Upon Tyne

on 9/8/2022.

Executors: Jane Doe 1 The Road The Square Northumberland NE6 000 (daughter)

John Doe 1 The Road The Square Northumberland NE6 000 (son-in-law)

Extracted by: THE LAW FIRM 23 The Office The Building Merseyside CH4 000

The Will contains the following bequests, subject to payment of other legacies, debts and testamentary expenses:-

From the sale proceeds of his home he left...**£1,000 each to:**

- Charity Name 1, with any wishes mentioned in the Will
- Charity Name 2

If his wife Jane Bloggs failed to survive him by 30 days he left...**the residue to the:**

- Charity Name3

This notice merely indicates that a charity is mentioned in the above Will. It does not imply that rights of benefit exist, as prior rights may not be known. The amount of the estate available for distribution does not necessarily correspond with the net value of the estate given. Smee & Ford has used its reasonable endeavours in identifying you as a potential beneficiary under this will. It is strongly recommended, however, that you obtain a copy of the Will so as to verify any entitlement that you may have.

Dealing with Lay Executors

We advise sensitivity in dealing communications with lay executors who can often be friends or family of the deceased. In cases where we have indicated, or you suspect a lay executor is involved, please consider delaying making contact to give them an opportunity to contact you first.

WARNING

Please note that you have received this notification as part of your current subscription to Smee & Ford services. The information contained within the report includes personal data as defined by the Data Protection Act 2018 and the GDPR. Smee & Ford have defined our position on GDPR in our document online <https://smeeandford.com/gdprfaqs>. Copies are available on request by email or post. Clients must assess their own position regarding GDPR. Clients are not permitted to pass on this report to another publication or services without our prior permission.

Failure to observe this ruling will result in disqualification from the service.

*** Please note that due to GDPR, which came into effect on May 25th 2018, we will no longer supply details of executors as part of our Discretionary notification service. You may obtain copies of the probate files, when necessary, directly from <https://probatesearch.service.gov.uk/#wills>**

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