

Smee & Ford

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Smee&Ford

Our Ref:1000/1231234

REPORT OF A DISCRETIONARY BEQUEST

The Will of Jo Bloggs

aged 92

of 1 The Street, Somewhere, London, N1 000

date of will 20/12/2017

The testator/ trix died on 29/12/2021 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:- Principal Registry of the Family Division

on 3/8/2022.

* Executor Relationships: solicitor

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

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

the residue to such charitable organisation or organisations as her Executors shall in their absolute discretion select and if more than one in such proportions as they decide

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 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 take extra care in your communications.

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/gdprfaq>. 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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