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England & Wales

HMCTS · PERSONAL APPLICANT

PA1P — Probate Application Checklist

A printable companion for the executor applying for the **grant of probate** where there is a will. Keep it beside the application — paper or digital.

ESTATE STANDARD 2026 · ES-2026

HMCTS · PERSONAL APPLICANT · PA1P (WITH A WILL) · PA1A FOR INTESTACY

PA1P is the HMCTS application that gives executors legal authority over an estate where the deceased left a will. This checklist mirrors

the live walkthrough at valoren.uk: it asks whether probate is needed at all, then walks every section of the form — A through G — as plain fields to gather, and closes with the fees, deadlines and the HMCTS helpline. Use the boxes to track progress; nothing here is filed from this page.

How to use this.

Page 3 is a five-point Yes/No check — even one Yes usually means probate is required. Pages 6 onward group the form's questions into seven plain-English sections, in the order the digital service asks them; the paper PA1P itself is laid out as a checklist, numbered sections and a legal statement. Tick each field as you have it to hand. The final pages carry the court fee, the statutory deadlines, the inheritance-tax deadline and the HMCTS helpline. The interactive walkthrough at valoren.uk/forms/pa1p runs the same logic with live notes.

Boundary — a walkthrough, not a submission.

The PA1P is now usually filed digitally at gov.uk/applying-for-probate. GOV.UK says you will usually get probate within **12 weeks** of submitting your application, longer if more information is needed, and that paper applications take longer to process than online ones. Where the estate involves a contested will, complex trusts, foreign-domicile questions or business succession, a regulated solicitor is the right answer. Valoren is not a solicitor and gives no legal advice.

Do you need probate? 1

FIVE-POINT QUICK CHECK — TICK YES OR NO FOR EACH

Not every estate needs probate. Joint accounts and joint property pass by survivorship and don't require it. Tick anything that applies — even one Yes usually means probate is required. No ticks may mean it isn't.

☐ YES ☐ NO

The deceased held assets in their sole name (bank accounts, investments, share holdings)

Sole-name accounts usually require probate above a small-balance threshold — **each bank sets its own figure**, and some publish none and decide case by case, so ask the bereavement team, in writing, what applies to that account.

☐ YES ☐ NO

The deceased owned property (sole owner, or tenant-in-common share)

Sole or tenant-in-common property requires probate to transfer or sell. Joint tenancy passes by survivorship and does not.

☐ YES ☐ NO

The estate is over the inheritance tax threshold (typically £325,000 single, up to £1m for couples)

If IHT is due, the IHT400 must be filed before the **grant of probate** can issue.

☐ YES ☐ NO

The deceased held business interests, shareholdings, or directorships

Companies House records, share registrar transfers, and IHT business-property-relief claims all sit alongside the probate application.

☐ YES ☐ NO

There are assets outside the UK

Foreign assets may require a separate grant in the foreign jurisdiction (resealing, ancillary probate, or local equivalent).

• READING THE RESULT

One or more Yes — probate is almost certainly needed. Walk through the seven sections that follow. If two or more apply, or any contested-will, complex-trust or substantial-foreign-asset element is present, a regulated solicitor is usually the right answer; the Probate Cost Calculator at valoren.uk shows the order of magnitude.

All No — probate is often not required. Joint accounts and joint property pass by survivorship; very small sole-name balances can be released against the **death certificate** alone. Confirm with each institution before assuming.

The seven form sections 2

A THROUGH G — THE ORDER THE DIGITAL SERVICE WALKS THROUGH THEM

The digital probate service at gov.uk/applying-for-probate presents these as guided pages with built-in validation. The paper PA1P uses the same structure, filled in by hand. Either route, the seven sections below cover what HMCTS will ask. Tick each field as you have it to hand.

A

PA1P · SECTION A

About the person who died

Identity, last address, marital status. The registrar's details should be exact.

- ☐ Full name (as on the **death certificate**)
- ☐ Date of birth and date of death
- ☐ Last permanent address
- ☐ Marital or civil partnership status at death

B

PA1P · SECTION B

About the executors

All executors named in the will must be accounted for — applying, renouncing, or having power reserved.

- ☐ Names and addresses of all named executors
- ☐ Who is applying for the grant
- ☐ Executors not applying (renunciation PA15 · power reserved · citation PA13)
- ☐ Executors who have died, are incapacitated, or are minors

C

PA1P · SECTION C

About the estate

Gross and net values. The IHT pathway test sits inside this section.

- ☐ Gross estate value
- ☐ Net estate value
- ☐ Inheritance Tax pathway test (EIS · full IHT400 · excepted estate)
- ☐ IHT must be paid first (HMRC IHT code before the grant issues)

PA1P · SECTION D

D Foreign domicile (if applicable)

Most UK probate applications skip this. Material only where the deceased was non-UK-domiciled at death.

- ☐ Domicile vs residence
- ☐ Non-UK-domiciled deceased (IHT scope now follows long-term UK residence — solicitor work)
- ☐ Surviving spouse not a long-term UK resident (capped spouse exemption)

PA1P · SECTION E

E Foreign property (if applicable)

Where the deceased owned property outside the UK, separate grants may be needed.

- ☐ Resealing of grants (Commonwealth countries)
- ☐ Ancillary probate (fresh application in the foreign jurisdiction)
- ☐ EU succession regulation (choice-of-law in the will)

PA1P · SECTION F

F Inheritance Tax

Confirmation of the IHT route taken — the document references HMCTS expects to see.

- ☐ Excepted estate confirmation (Estate Information Summary)
- ☐ IHT400 pathway (HMRC IHT code / Unique Reference Number)
- ☐ Schedules to know about (IHT402 · 403 · 405 · 413 · 417 · 418)

PA1P · SECTION G

G Statement of truth and signatures

The legal commitment. Wrong information here is potentially perjury.

- ☐ What you are confirming (will authentic · values accurate · administer per law)
- ☐ Signatures — digital application (each applying executor signs)
- ☐ Signatures — paper PA1P (wet-ink, on the form itself)
- ☐ Where to send (paper): HMCTS Probate Registry, PO Box 12625, Harlow CM20 9QE

Key facts 3

FEES, DEADLINES AND THE HELPLINE — HMCTS / GOV.UK PUBLISHED REFERENCES

COURT FEE

£526

The fixed HMCTS fee for estates over **£5,000**. Free under **£5,000**. Sealed copies are **£2** each with the application, **£16** after — order one for each organisation that holds an asset.

TIME TO THE GRANT

12 weeks

GOV.UK's expectation, not a promise: you will usually get probate within 12 weeks of submitting your application, and it can take longer if you need to provide more information. Paper applications take longer to process than online ones.

INHERITANCE TAX DUE

6 months

From the end of the month of death. Interest accrues thereafter. Where IHT is due, it must be paid (or the first instalment) before the grant issues.

APPLY FOR THE GRANT

No deadline

GOV.UK's probate guide sets no deadline for applying. Where full Inheritance Tax details are needed, form IHT400 must reach HMRC within **12 months** of the death and before you apply. Register the death within **5 days** first (8 in Scotland).

HMCTS PROBATE HELPLINE · FREE · PUBLIC

0300 303 0648

For application questions. They cannot give legal advice, but they can clarify form-completion mechanics — the right call when stuck on a section. The **nil-rate band** is **£325,000** (single), up to **£1**m for couples; the residence band adds **£175,000** where a home passes to direct descendants.

POWERED BY VALOREN

PA1P — Probate Application Checklist — a step-by-step guide to completing the probate application form. Free reference from the Valoren estate administration series. Accurate for England & Wales as of June 2026. Not legal or financial advice.

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