

Resource

# Guidance for lay executors

Please see below for our guidance on administering an estate and executing a Will.

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## A step by step guide

### 1. Get a copy of the Will and check it is valid

Most people keep a copy of their Will at home or with their solicitors. It is important to check the Will you have is the most recent version. A solicitor will be able to advise if the Will is valid.

### 2. Collect details of your loved one's assets and any debts

As the lay executor, you will need to gather the details of your loved one's estate, including accurate valuations of all assets and any outstanding debts. This is sometimes referred to as a schedule of assets and liabilities. You will need this information when applying for the Grant of Probate (England, Wales and Northern Ireland) or Confirmation (Scotland).

### 3. Apply for a Grant of Probate

Getting a Grant of Probate (or Confirmation if the deceased lived in Scotland) allows you to legally deal with the deceased's estate. In most cases you'll need to do this before you can access their bank account, mortgage and any investments.

To get a Grant of Probate you need to:

- Complete a probate application form, this will be different depending on where the deceased lived. If the deceased lived in England, Wales or Northern Ireland, please see [here](#). If the deceased lived in Scotland please see [here](#).
- Complete the appropriate Inheritance Tax form, see [here](#).
- Send your application to your local Probate Registry office, see [here](#). Check what you should include with your application on [here](#).
- Swear an oath, you must do this before a solicitor or at the local probate office. Your local probate office will help you arrange this appointment.

Once you have submitted your application to the Probate Registry, it should take between three to four weeks to receive a Grant of Probate. However, at the moment, the Probate Registry is

experiencing delays.

#### 4. Pay inheritance tax (if applicable)

Inheritance tax is payable on all estates worth over a certain amount. it's important to check if the deceased's estate qualifies, see [here](#).

All estates have to submit the appropriate inheritance tax form, even if there is no inheritance tax to pay, see [here](#). As the National Rheumatoid Arthritis Society (NRAS) is a charity, most gifts left to us are exempt from inheritance tax, but this is not the case in every scenario.

If more than 10% of the value of the estate has been left to charity, inheritance tax may be payable at a reduced rate. In this circumstance, see [here](#) for the appropriate form. This form should be submitted with your other inheritance tax paperwork when applying for a Grant of Probate. For further details of inheritance tax exemptions and conditions, see [here](#).

#### 5. Take control of all assets, settle any outstanding debts and distribute the estate in line with the Will – including gifts to the National Rheumatoid Arthritis Society (NRAS).

You are now ready to distribute the estate to the right people. After any debts, like mortgages or loans, have been paid off, you can distribute the gifts left in the Will to the beneficiaries.

How do I know if a gift is meant for the National Rheumatoid Arthritis Society (NRAS)?

A gift is likely to have been left to NRAS if it uses either of the following addresses and/or charity numbers.

Our charity has had one previous address and has also been registered under one previous charity number.

Charity Name	Registered Charity Number
The National Rheumatoid Arthritis Society	1086976 (until 20 <sup>th</sup> August 2010)
<a href="#">The National Rheumatoid Arthritis Society</a>	1134859 (current number)

Current address: NRAS, Beechwood Suite 3, Grove Park Industrial Estate, White Waltham, Maidenhead, Berkshire, SL6 3LW

Previous address: Ground Floor, 4 Switchback Office Park, Gardner Road, Maidenhead, Berkshire, SL6 7RJ.

## Contact Us

Please contact our Supporter Relationships Manager, Emma Spicer, on [espicer@nras.org.uk](mailto:espicer@nras.org.uk) or 01628 501 548 if you are unsure what to do or if you need to make a payment to NRAS as part of the distribution of a charitable gift from an estate.



## [Article](#)

### [Gifts in Wills](#)

[Gifts in Wills, whatever the size, make a big difference. A gift in your Will enables NRAS to continue to develop and deliver vital services to those living with rheumatoid arthritis \(RA\) and juvenile idiopathic arthritis \(JIA\), now and in the future.](#)

## [Article](#)

### [How to leave NRAS a gift in your Will](#)

[How to leave a charitable gift to NRAS in your Will? To include a gift to NRAS in your Will, please ask your solicitor to use our charity details, including our address details listed below, to ensure your kind gift reaches us. The National Rheumatoid Arthritis Society \(NRAS\), a registered charity in England and Wales \(1134859\), Scotland \(SC039721\). The National \[...\]](#)

## [Article](#)

### [Projects made possible by gifts in Wills](#)

[NRAS has been fortunate to benefit from a number of generous gifts in Wills, these gifts have supported the charity in providing vital services to those living with rheumatoid arthritis \(RA\) and juvenile idiopathic arthritis \(JIA\) across the UK.](#)

## [Article](#)

### [Gifts in Wills – frequently asked questions](#)

[Please see below for frequently asked questions about leaving a gift in your Will.](#)