



# EVENT INFORMATION PACK

*Providing you with further information into the event,  
the organiser, the CPD & our speakers...*

## Navigating Due Diligence in Probate Research

A collaborative approach to research & contested matters

12th March | 12:30pm

We are delighted to welcome you to our first Private Client webinar of 2025!

This webinar will explore the growing complexity of probate cases in light of evolving family structures and the startling statistic that over 50% of people pass away without a will. With contested probate matters on the rise, often involving missing heirs, unclaimed estates, or legal disputes, the need for thorough due diligence in probate research has never been more critical.

In partnership with the Surrey Law Society, this webinar brings together specialists from Finders International and Morr & Co, who will share their expertise on how rigorous probate research enhances due diligence, ensures client satisfaction, and mitigates reputational risk for legal practitioners.

Join us as we delve into the common pitfalls in probate cases, the importance of meticulous research, and the transformative benefits of collaboration between legal professionals and genealogists.



**Alan Taylor**  
**Private Client Business Development Manager**  
[alan.taylor@findersinternational.co.uk](mailto:alan.taylor@findersinternational.co.uk)

## NOTICES

### FEEDBACK & RAFFLE

Leave feedback to be entered into the raffle to win  
a **£50 Amazon Voucher**

**Winner will be contacted after the event.**



For every feedback form filled, we will also donate £1 to our chosen charity for 2025

**We will be announcing more events relevant to you in the coming months so keep an eye out for us in your inbox!**

# OUR SPEAKERS . . .



**Alex Sorrell**  
Case Manager

Alex is a Case Manager in the Private Client Team at Finders International and has been with the company for over 10 years.

She deals with a large variety of cases, from locating beneficiaries named in Wills to complete intestacies with little family information known, collaborating closely with solicitors, Personal Representatives and beneficiaries. Drawing on her vast knowledge, each estate is subject to extremely in-depth research to ensure all the beneficiaries are identified, as well as obtaining the necessary supporting documents.

She has an active role in the Private Client team as well as mentoring staff to reach their full potential. She has a passion for genealogy and enjoys the complex nature of research.



**Jonathan Jacobs**  
Partner

With over 20 years of experience in Wills, Probate, Tax, and Trusts, Jonathan specialises in estate planning and administration. Since qualifying in 2000, he has supported families through sensitive times, combining technical expertise with a compassionate, client-focused approach.

Jonathan handles a wide range of private client matters, including Wills, Powers of Attorney, trust management, and probate administration, from straightforward cases to complex arrangements.

His knowledge of French law and language also provides added value for clients with French connections or assets.

## SLS MEMBER BENEFITS

- **Educational Programmes** – A free webinar programme and discounted training courses, available both online and in person.
- **Networking and Social Events** – Opportunities to connect with peers through various events designed to foster professional relationships across Surrey.
- **SLS Legal Awards Programme** – Established in 2018, the SLS Legal Awards recognise excellence in the legal profession.
- **Advocacy and Representation** – SLS actively responds to consultations and lobbies the government on behalf of our members.
- **Publications and Communications** – Members receive monthly e-Bulletins and a quarterly magazine.
- **Job Noticeboard** – Firms can advertise vacancies for free on our job noticeboard.

## About Surrey Law Society

The Surrey Law Society (SLS) is the professional body representing legal practitioners across the county of Surrey. With a membership of over 1,100 individuals, the Society encompasses a wide range of legal professionals—from sole practitioners and boutique firms to the largest legal practices in the region. Our members include everyone from students and trainees just starting their careers, to managing partners leading established firms.

The Society is committed to supporting its members at every stage of their professional journey. We offer a host of valuable benefits, including a comprehensive **free webinar programme, discounted training courses** (delivered both online and in person), and a range of **social events** designed to foster meaningful networking opportunities and strengthen relationships across the local legal community.

In 2018, the Society proudly launched the **SLS Legal Awards**, now a much-anticipated annual event in the Surrey legal calendar. Currently in its seventh year, the Awards programme celebrates excellence across the legal profession in Surrey, attracting over 300 guests to its gala and ceremony held each October at G Live in Guildford. With 14 award categories recognising individual, team, and firm-based achievements, the Awards provide a significant platform to showcase the outstanding work of our members.

The Society also plays an active role in representing its members' interests. We regularly **respond to consultations** and **lobby government** on key legal and regulatory issues, ensuring that the voice of the Surrey legal profession is heard at the highest levels.

To keep our members informed and engaged, the Society circulates a **monthly e-Bulletin** featuring updates on current issues, and a **quarterly magazine** in which members are encouraged to share firm news, contribute thought leadership, and reflect on trends shaping the legal sector.

Further support for our members includes access to a **free job noticeboard** for advertising vacancies. These listings are promoted via the Society's social media channels to help connect the right talent with the right opportunities across Surrey.

[www.surreylawsociety.org.uk](http://www.surreylawsociety.org.uk)

[admin@surreylawsociety.org.uk](mailto:admin@surreylawsociety.org.uk)





WHY  
CHOOSE US

HEIR LOCATION  
AND PEOPLE  
TRACING

FAMILY TREE  
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COURT OF  
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CONTACT US

# PRIVATE CLIENT SERVICES



TRACING HEIRS TO ESTATES, PROPERTY & ASSETS

[www.findersinternational.co.uk](http://www.findersinternational.co.uk)

# ABOUT US

Finders International is an award winning, innovative professional probate genealogy company. Established in 1997, our broad range of services focus on mitigating risk in estate administration.

As one of the largest firms in our field, we have offices in London, Edinburgh, Cardiff, Yorkshire, Dublin and Sydney and over 140 personnel, enabling us to complete searches quickly across multiple jurisdictions. Combining technology focused solutions with traditional genealogy methods, we have a proven track record of tracing beneficiaries globally.

We are best known for tracing missing heirs and identifying lawful and entitled next of kin, having worked extensively with lawyers, probate practitioners, financial institutions and Court of Protection teams.

We always work efficiently and in the best interests of the estate, the personal representatives, beneficiaries and your firm at all times.



# WHY CHOOSE US

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We specialise in providing a comprehensive range of probate genealogy services to mitigate risk and provide due diligence in estate administration. Each year, we support over 600 professionals on over 6000 estate matters, handling case of all sizes with expertise and care.

## *Here's how we stand out:*

### **Our Team:**

#### **Dedicated Private Client, Legal Support and International Asset teams:**

We respond swiftly and provide regular updates on case developments, ensuring you are always kept informed of progress in a timely matter.

**Expert Training:** All research staff have received CRUSE Bereavement Care Training in 'Loss and Bereavement Awareness' and have attended Dementia Friends sessions, equipping them with the sensitivity and knowledge needed for managing delicate cases.

### **Accreditations:**

**Professional memberships:** We are proud members of the International Association of Professional Probate Researchers (IAPPR), upholding the highest standards in the industry.

#### **ISO Certifications:**

- ISO/IEC 27001 - Data & Information Security Management: Demonstrating our commitment to data protection and security.
- ISO 9001 - Quality Management: Ensuring the highest level of quality across our processes and services.
- ISO 14001 - Environmental Management System: Reflecting our dedication to sustainable and environmentally responsible practices.

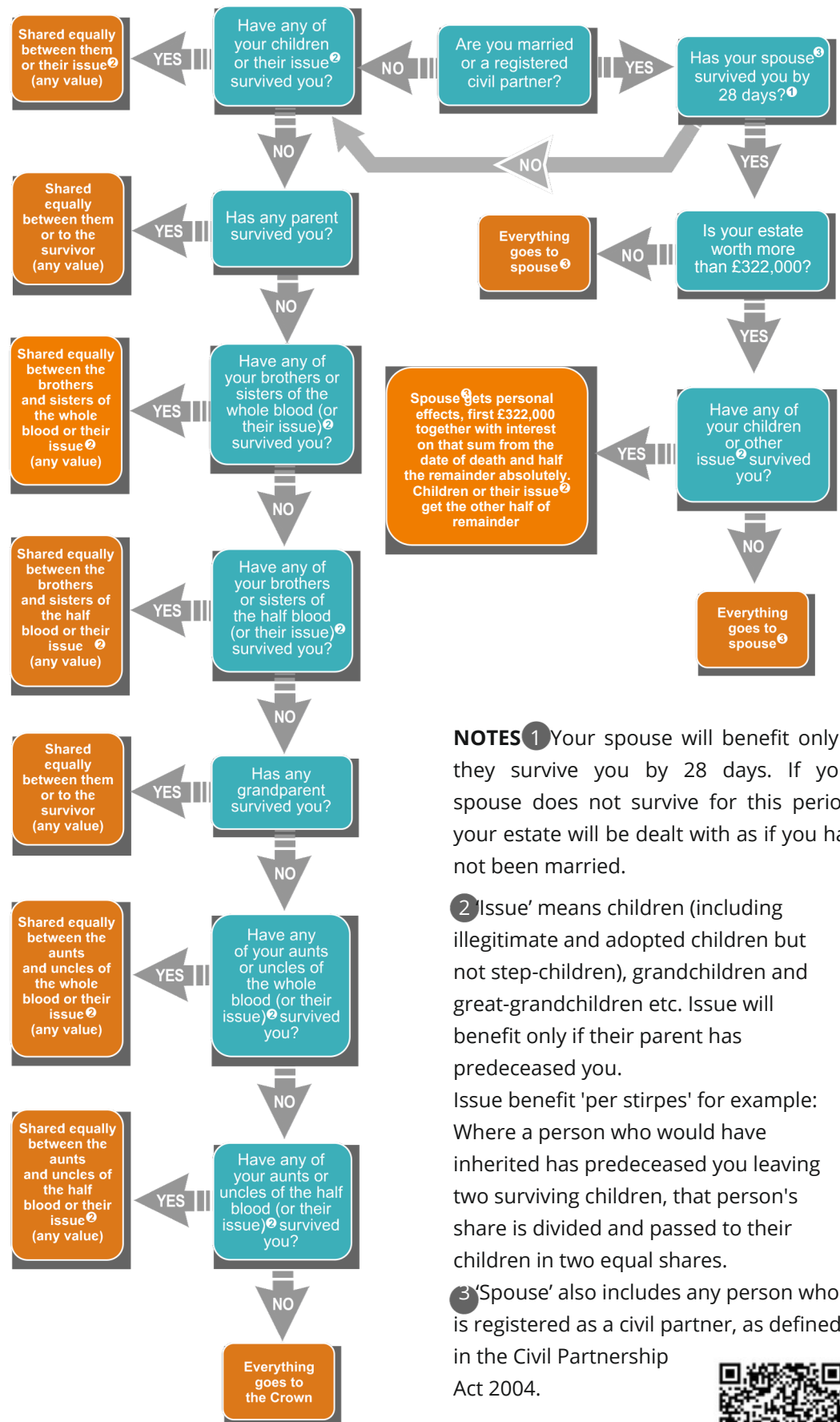
**Cyber Essentials Certification:** Demonstrating the technical controls in place to protect our systems from common cyber-attacks.

We are committed to maintaining standards that align with those upheld by the private client sector. Our credentials offer you the assurance that you are in safe hands.

*For a detailed overview of our credentials, please visit our website:*

[www.findersinternational.co.uk](http://www.findersinternational.co.uk)

A summary of the intestacy provisions in England & Wales



**NOTES** <sup>1</sup>Your spouse will benefit only if they survive you by 28 days. If your spouse does not survive for this period, your estate will be dealt with as if you had not been married.

<sup>2</sup>Issue' means children (including illegitimate and adopted children but not step-children), grandchildren and great-grandchildren etc. Issue will benefit only if their parent has predeceased you.

Issue benefit 'per stirpes' for example: Where a person who would have inherited has predeceased you leaving two surviving children, that person's share is divided and passed to their children in two equal shares.

<sup>3</sup>'Spouse' also includes any person who is registered as a civil partner, as defined in the Civil Partnership Act 2004.



# HEIR LOCATION & PEOPLE TRACING

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HEIR LOCATION  
& PEOPLE  
TRACING

We specialise in tracing missing beneficiaries on testate and intestate matters using our advanced, technology-driven solutions. Our innovative tools streamline the process of locating entitled relatives to the deceased's estate, ensuring accuracy and compliance with best practice.

## Intestacies

We conduct detailed genealogical research to locate heirs, whether that's to locate a single heir or full family tree research. We verify relationships through records such as birth, marriage, and death certificates, ensuring accurate identification and correct estate distribution.

## Testate matters

We help ensure the terms of the Will are fulfilled by finding all named beneficiaries, legatees or missing executors, even those who are difficult to locate. We also provide proof of death for pre-deceased beneficiaries.

## Global reach

Our dedicated International team work alongside our network of researchers enabling us to navigate local legal systems, ensuring efficient and thorough genealogical research and estate resolution across different jurisdictions. We have carried out research in over 73 countries in the past year alone.

## Administrator search

Whether you are a Deputy whose authority has ceased on death, or your firm has been referred a case by a non-entitled relative, friend or public/private sector body, we can assist with a free administrator search and locate entitled beneficiaries.

We can help secure instructions for your firm to administer the estate, recovering any already incurred costs, and generating further fee earning potential.

The Crown or State has no interest in an estate where a valid Will is found, or heirs exist in accordance with Intestacy rules.

*Email us for a no obligation discussion regarding your matter:*

[quotes@findersinternational.co.uk](mailto:quotes@findersinternational.co.uk)



# FEE OPTIONS

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In all cases we provide bespoke quotations, confirming which fee options are appropriate according to the specific circumstances of the case. By providing a range of fee options, we focus on giving our clients choice.

Our quotes are provided free of charge

- **Contingency** - Research is carried out at no charge to the estate or your firm. A percentage commission is agreed with all located heir(s) and is payable from their individual net share(s) on distribution of the estate.
- **Estate/Trust Agreement** - Research is carried out at no charge to the estate or your firm. A percentage commission fee is agreed with the personal representative ("PR") in advance, and is then payable from the individual net shares of any heirs we locate.
- **Budget** - Research carried out to an agreed budget limit and paid by the general estate. We report on the conclusion or progress made within this figure.
- **Fixed Fee** - Fee paid by the general estate. Once the research goal is determined, which could be to trace heirs or prove a negative to the advantage of existing heirs, a fee is agreed which is payable only if that goal is achieved.

Contact us via email or QR code to discuss your matter:

[quotes@findersinternational.co.uk](mailto:quotes@findersinternational.co.uk)



# FAMILY TREE VERIFICATION

## Due diligence and mitigating risk

Our service verifies the family tree prior to assets or funds being distributed. This is a vital step for estate practitioners and personal representatives to mitigate the potential risks of an incorrect distribution, and demonstrates best practice.

Errors can occur due to:

- Reliance on a single family member for information.
- Family secrets and mistaken testimony from family members.
- Using an inexperienced researcher or genealogist, perhaps with limited research resources at their disposal.
- Reliance on internet-based information sources, which are estimated to have errors in transcription in about 10% of all records.

We have seen many cases where family have provided solicitors with outdated details, wrong information and/or omissions from the family tree. Our research prevents incorrect distribution of funds and safeguards the personal representatives and solicitors from future claims.

**All quotes are prepared free of charge and will highlight areas of risk.**

## Insurance protection

Verification of the family tree is a pre-requisite when obtaining Missing Beneficiary Indemnity Insurance. A draft policy will be automatically provided with our verification report.

Email us for a quote: [quotes@findersinternational.co.uk](mailto:quotes@findersinternational.co.uk)

FAMILY TREE  
VERIFICATION





# FAMILY TREE VERIFICATION

## CASE STUDY

In one case, we were instructed by a solicitor to verify a family tree.

Our team began by thoroughly researching both the paternal and maternal family lines to ensure all potential heirs were identified. Through this diligent investigation, we uncovered a previously unknown half-sibling. This discovery led us to an unexpected heir who was astonished to learn of her entitlement to the estate. Initially skeptical, she almost dismissed our letter as a scam. However, the verification of her half-sister's existence and connection made clear her legitimate claim, securing an inheritance of approximately £300,000 as the sole beneficiary to the Estate.

This case underscores the value of our Family Tree Verification service in ensuring accurate and thorough research often resulting in life-changing outcomes.

FAMILY TREE  
VERIFICATION



# COURT OF PROTECTION SERVICES

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## One-stop-shop

We provide a one-stop-shop when applying to the Court of Protection, ensuring you carry out your duties effectively and efficiently.

## Deputyship application

Finders can assist pre-Deputyship applications if the Court requires you to contact family, friends, and neighbours of the Client.

## Statutory Will application

Finders can assist in constructing P's family tree in a sensitive and discreet manner to confirm next of kin (wherever they are in the world). Our report provides full family contact details enabling you to contact them directly regarding the application.

## Additional services

**Missing Will search service:** A search to ensure that P has no existing Will, or that the Will you hold is the most current.

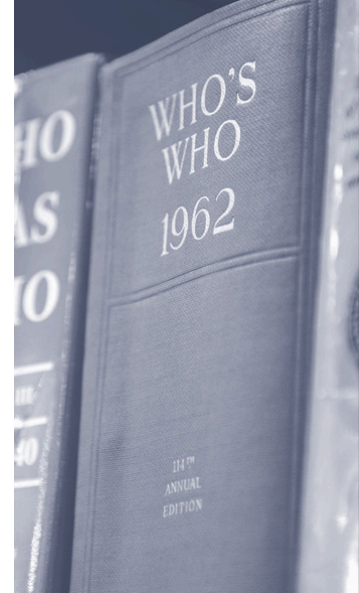
**Financial asset search:** A financial asset search for living clients under Deputyship order. This service ensures that, as Deputy, you are aware of all assets P holds.

**Administrator search:** In the event that P passes away with no known next of kin, we can trace surviving kin and identify a potential administrator. We then put your firm in touch with the prospective administrator to move forward with the estate administration.

## Unoccupied property insurance

- All periods of cover offered (from 3 months)
- Buildings and contents covered

Email us for a quote: [quotes@findersinternational.co.uk](mailto:quotes@findersinternational.co.uk)



COURT OF PROTECTION SERVICES

# COURT OF PROTECTION

## CASE STUDY

At the point of our instruction, the only information held was that P had a deceased partner and one living cousin. Our research firstly confirmed that P did not have any children and was an only child.

Extensive research using all available genealogical resources confirmed that P had no living paternal family, however we confirmed that P's maternal family was larger than expected.

During the course of our research we identified six maternal aunts and uncles who left descendants, identifying a number of living cousins.

As part of our verification process we obtained birth, marriage and death certificates, and identified current addresses for all P's next of kin. At the Deputy's request, no contact was made with the family prior to our report being submitted.

This information was provided to the Deputy in an easily digestible family tree and report, with appropriate supporting documentation.

Our involvement was key as we identified a further nine family members in addition to the already known cousin. This full picture enabled the Deputy to proceed with the Statutory Will application, and notify all the correct next of kin.



*"The process was very quick and concise and you found the information we needed straight away."*  
Deputy, UK Solicitor.

For Court of Protection research assistance email:

[quotes@findersinternational.co.uk](mailto:quotes@findersinternational.co.uk)

COURT OF  
PROTECTION  
SERVICES



# LEGAL SUPPORT SERVICES: MISSING WILL SEARCH

Our comprehensive service assists in locating lost and unknown Wills. If you're dealing with an intestacy and need to check for a Will, or if you are unsure if a more recent one exists, our advanced digital tools can assist. We leverage secure databases and cutting-edge technology to efficiently verify the existence of any updated Wills, providing you with accurate and timely information.

The service takes approximately 30 days to complete and is pre-approved for Aviva Missing Will Insurance cover on conclusion.

## The service includes:

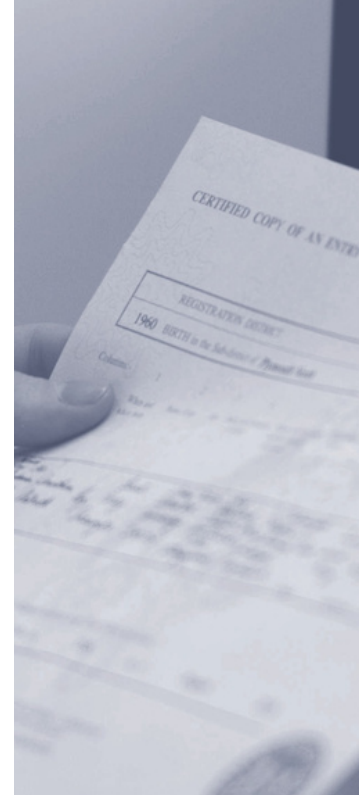
- Writing to all solicitors (via post) local to the deceased and/or in any other specific area(s) as requested.
- Checking with the deceased's bank(s), building societies & accountants.
- Contacting the Will writer members of the IPW and SWW.
- Checking the depository of the Principal Registry of the Family Division.
- National Will Register search, a search of all Wills registered comprising c.84 million registrations.
- Searching all relevant additional databases and contacting other professional bodies as necessary or as requested.
- Pre-approval for Missing Will Insurance upon completion of the Missing Will Service.

We can also search for Wills of living clients under Lasting Power of Attorney or Court of Protection Orders (see overleaf).

## Timeline

Our research takes approximately 30 days to complete.

Please email us for a quote: [LSS@findersinternational.co.uk](mailto:LSS@findersinternational.co.uk)



LEGAL SUPPORT  
SERVICES  
Missing Will  
Search

# MISSING WILL SERVICE FOR LIVING CLIENTS

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Our Living Missing Will Search assists Deputies by searching for Wills' for their clients.

## Missing Will Search Service

The search draws together many of the same resources as our Missing Will Search service, including contacting solicitors, local Will writers, banks & building societies and chartered accountants directly to check if they are storing or were involved in drafting a Will.

Advance payment of the service charge is requested and our research takes approximately 30 days to complete.

*For our Missing Will services and costs email our Legal Services support team: [LSS@findersinternational.co.uk](mailto:LSS@findersinternational.co.uk)*

LEGAL SUPPORT  
SERVICES  
Living Person  
Will Search



# MISSING ASSET SEARCH

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## The importance of asset searches

Asset searches are crucial in estate administration. Failing to identify all financial assets can result in penalties under the new Inheritance Tax (IHT) regime, and firms risk negligence claims. Using advanced asset search technology ensures comprehensive identification, helping practitioners avoid costly errors and stay compliant.

## What will the search cover?

- Over 150 financial institutions
- Share registrars
- Pension providers and insurers
- Credit Reference Agency Data

The search for missing or unclaimed assets will take up to 50 days to complete, however, updates are available during the search at your request. You will be notified if any further findings or positive responses are received after this period.

## Asset search for living clients

Under Lasting Power of Attorney or Court of Protection Orders, we can also offer an asset search to assist deputies locate assets for living clients.

The search draws together resources to check for unclaimed and missing assets, and check for funds that may have been overlooked or deposited in unknown accounts.

This search takes up to 50 days to complete and you will be notified if any further findings or positive responses are received after this period.

*For more information email: [LSS@findersinternational.co.uk](mailto:LSS@findersinternational.co.uk)*



MISSING ASSET  
& OVERSEAS  
BANKRUPTCY  
SEARCHES

# OVERSEAS BANKRUPTCY SEARCH

## What happens if a beneficiary is bankrupt?

When an individual becomes bankrupt, in most jurisdictions across the world a 'Trustee in Bankruptcy' is established and ultimately the individual loses the ability to control all of their own assets.

## What are the possible consequences for Personal Representatives?

Those who do not follow the correct probate distribution guidelines could face legal action.

Trustees in Bankruptcy are entitled to sue the PR's for the amount distributed in error.

## Mitigate Risk

The SRA encourage solicitors to carry out due diligence for both domestic and international beneficiaries.

Our Overseas Bankruptcy Search service covers numerous jurisdictions worldwide, utilising international insolvency databases and local research agents and resources.

We offer a same day service across the globe. See our website for a full list of the countries covered.

*For further information on this service, email our Legal Support Services team, or scan the QR code:*

[LSS@findersinternational.co.uk](mailto:LSS@findersinternational.co.uk)

Overseas  
Bankruptcy  
Search Service Cost

**£85.00**

+ VAT per search

(Additional disbursements  
may apply for some  
jurisdictions).



OVERSEAS  
BANKRUPTCY  
SEARCH



# TRUSTEE RESEARCH SERVICES

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In cases where a trustee or beneficiaries of a Trust are absent, missing, or unknown, Finders International offers a dedicated Trustee Research Service to locate or verify these individuals in order to ensure the trust's smooth administration and compliance with legal obligations.

- **Identification and verification**

We identify potential beneficiaries of Trusts who may be challenging to trace, or in cases where the trustee's details are incomplete. Our service includes thorough verification to confirm the suitability and eligibility of identified individuals.

- **Global reach with local expertise**

With a network of researchers across multiple jurisdictions, we locate individuals both nationally and internationally.

- **Legal documentation support**

We assist in obtaining any necessary documentation to confirm the beneficiary eligibility.

## Trustee Insurance

On the winding up of trusts, our verification of the entitled beneficiaries or class of kin, enables practitioners to obtain Trustee Insurance for additional protection and mitigation of risk. A no- obligation draft can be provided on completion of our report.

## Why this service matters for legal professionals

For legal professionals handling estates and trusts, the absence of a trustee or uncertainty as to the whereabouts of trust beneficiaries, can lead to significant delays and legal complications. Our service provides a reliable solution to these challenges, helping locate and verify trustees, and heirs to trusts, so that estates and trusts can proceed in accordance with legal requirements.

Email us today for a quote: [quotes@finderinternational.co.uk](mailto:quotes@finderinternational.co.uk)

TRUSTEE  
RESEARCH  
SERVICES

# TRUSTEE ACT NOTICES

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## Why is it important to place a deceased estate notice?

It is the responsibility of the Personal Representatives to handle any claims from creditors against the deceased's estate, whilst protecting themselves from any unknown liabilities.

It is recommended that once a Grant of Probate has been issued, a statutory notice is placed in The Gazette and a local newspaper closest to where the deceased owned land or property. Placing these notices mitigates risk and provides statutory protection for the estate's PRs against personal liability under the Trustee Act 1925.

We can place Section 27 Trustee Act notices in the London, Edinburgh or Belfast gazettes and a local newspaper of your choice.

Section 27  
Trustee Act  
Notice

£99

+VAT & disbursements  
for Gazette notice and  
a local newspaper

## Early Distribution Insurance

As an alternative to placing Section 27 Trustee Act notices, We can provide insurance offering the same statutory protection to the estate. This allows the PRs to forego the minimum two month and one day notice period and enable earlier distribution of estate funds.

*For further information on these services email:*

[LSS@findersinternational.co.uk](mailto:LSS@findersinternational.co.uk)

TRUSTEE ACT  
NOTICES



# CLIENT ACCOUNT BALANCES

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Solicitors in England and Wales are legally required to handle residual client funds with care, ensuring compliance with SRA Account Rules. When funds remain on a client account, it's crucial for solicitors to make every reasonable effort to return them to the rightful owner. Failure to do so could lead to regulatory breaches and penalties.

Under Rule 2.5 of the SRA Accounts Rules, solicitors must promptly return client funds once there is no longer a legitimate reason to retain them. This applies regardless of the balance size. However, when funds go unclaimed, solicitors are responsible for exhausting all avenues to trace the client. If these efforts fail, particularly for balances of £500 or more, solicitors must seek written permission from the SRA before moving the funds.

Engaging us can be invaluable in locating missing clients or heirs, ensuring compliance with these stringent SRA requirements. Our cost-effective, reliable tracing service helps solicitors meet their obligations while avoiding the potential risks associated with unclaimed client funds. The SRA may allow deduction of reasonable expenses for tracing services if all efforts to contact the client are unsuccessful.

For solicitors handling residual client funds, tracing the rightful owners isn't just good practice - it's essential for compliance and maintaining professional integrity.

Contact *Finders International* for expert assistance with tracing clients:  
[quotes@findersinternational.co.uk](mailto:quotes@findersinternational.co.uk)



CLIENT  
ACCOUNT  
BALANCES

# MISSING DOCUMENT SERVICE

We can obtain **English & Welsh** documents as follows:

- Certificates of birth, marriage, death & adoption
- Copies of Wills, grants of probate or grants of letters of administration
- Copies of decrees absolute
- Other documents on request

Scottish, Irish, and other overseas documents can be obtained on request.

Please email us at [missing\\_document@findersinternational.co.uk](mailto:missing_document@findersinternational.co.uk) with details of your requirements.

## **Birth / Marriage / Death / Adoption** (certified copies)

| Delivery Option | Time           | Cost (ex. Service charge) |
|-----------------|----------------|---------------------------|
| Standard        | 5 working days | £12.50 each               |
| Priority        | 2 working days | £38.50 each               |

(costs correct as of 1.9.2024).

## **Decree Absolute** (certified copies)

Take 30-90 days. Costs vary depending on date range searched.

A service charge is added depending on the number of documents you order.

Contact us for missing documents by scanning the QR code or by email:

[missing\\_document@findersinternational.co.uk](mailto:missing_document@findersinternational.co.uk)



MISSING  
DOCUMENT  
SERVICE



# INTERNATIONAL ASSET SERVICES

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Finders' International Asset Service provides consultative and practical support whilst dealing with foreign assets in an estate. Louise Levene brings twenty years' experience in probate support services and asset recovery, applying a problem-solving approach, helping to sell, transfer or recover a range of overseas assets including shares, bank accounts, and investment portfolios.



## North American shares

If you are dealing with shares owned by a client or estate that are registered in the US or Canada, Finders can help transfer or sell them.

## Medallion Guarantee stamps

Finders will have the Medallion Guarantee Stamp affixed to your US or Canadian securities transfer instruction. Detailed instructions and support are part of the service we offer.

## Closing bank and investment accounts

If you're administering an estate and need help with the closure of a foreign bank account, we can help you and the estate representatives break through the bureaucracy and complete the necessary steps to bring the funds back into the estate.

## Obtaining overseas probate, resealing Grants and Confirmations

In many overseas jurisdictions, you may not be able to repatriate estate assets above a certain value, without the involvement of the Court. For Commonwealth countries, that means resealing the Grant or Confirmation in the Courts. In others it may mean a detailed and lengthy succession procedure – every jurisdiction has its own requirements. We can assist in navigating these complexities and obtaining or resealing grants overseas.

Email: [IAS@findersinternational.co.uk](mailto:IAS@findersinternational.co.uk)



INTERNATIONAL  
ASSET SERVICES

# INTERNATIONAL ASSET SERVICES

## CASE STUDY

Mrs Branford\* died leaving what was once a straightforward, London-listed UK share portfolio. In recent years and with failing health, she stopped actively managing her portfolio. After her death, her executors found she had 'accidentally' acquired several high value shareholdings listed in the USA, through corporate acquisition and stock spin-offs.

The legal practitioners advising the estate had little experience with this kind of work and brought Finders International in to complete the necessary steps. US estate tax clearance was procured due to the high value of the assets, and the shares transferred out of the Mrs Branford's name, using Medallion Guarantee stamps to satisfy the requirements of the transfer agents, and subsequently sold.

\*Names changed for confidentiality

*For further information on our International Asset services, see our website or contact our International Asset Services Team:*

**[IAS@findersinternational.co.uk](mailto:IAS@findersinternational.co.uk)**

INTERNATIONAL  
ASSET SERVICES



# AVIVA INSURANCES

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## Estate protection

Administering an estate can often present a unique set of challenges to personal representatives and estate practitioners.

- Have all beneficiaries been identified?
- How can we account for a missing beneficiary's share?
- Can we be sure the Deceased died intestate?

Finders are the longest standing provider of AVIVA online policies. Once our report is completed, we can apply for and obtain policies instantly.

Insurance offers reassurance and helps protect against the unknown. Whilst a professional genealogist can take steps to mitigate the risks of incorrect distribution, it is always recommended to obtain insurance cover to provide additional security and peace of mind prior to distribution.

### Insurance products include:

- Missing Beneficiary Indemnity Insurance
- Missing Beneficiary Comfort Policy
- Missing Will Insurance
- Early Distribution Insurance (sometimes referred to as No Section 27 Notice)
- Inheritance Act Insurance
- Trustee Insurance

*For more information on our insurances by AVIVA, scan the QR code or email:*

[LSS@findersinternational.co.uk](mailto:LSS@findersinternational.co.uk)



# WEBINARS & TRAINING

## DEVELOPMENT HUB

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We understand the importance of continuous learning and staying ahead in a rapidly evolving landscape. That's why we're proud to provide our Development Hub - your gateway to free, on-demand webinars, events, and resources designed to elevate your expertise and keep you at the forefront of industry best practices.

### Our hub offers:

- **Free, on-demand learning:**  
Access to a wide range of webinars and events tailored to meet the needs of professionals - anytime, anywhere.
- **Expert-led content:**  
Learn from industry leaders and subject matter experts who bring the latest insights, trends, and strategies directly to you.
- **CPD-certified training:**  
Earn Continuing Professional Development (CPD) credits with our certified courses, helping you maintain and enhance your professional standards.
- **Comprehensive coverage:**  
Whether you're in Private Client or Court of Protection services, our hub offers valuable training on key topics essential to your practice.

### How do I access the free content?

Visit the website [www.findersdevelopmenthub.co.uk](http://www.findersdevelopmenthub.co.uk) or scan the QR code and sign up today.

*For any queries email us at:*

[info@findersdevelopmenthub.co.uk](mailto:info@findersdevelopmenthub.co.uk)



# CONTACT US

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For further information on our services, visit our website  
[www.findersinternational.co.uk](http://www.findersinternational.co.uk)

| Type of Enquiry                       | Point of contact                            |
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## CONTACT US

If you would like to discuss any probate  
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If you would like reach out to the Surrey Law  
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