



Case Studies in Probate Genealogy: Lessons from Practice

Confidentiality Notice

The case studies included in this paper have been anonymised and amended for confidentiality. Names, dates, and certain details have been adapted to protect the privacy of the individuals and families involved, while still demonstrating the real-life challenges encountered and the solutions applied.



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Introduction: Probate in a Changing Landscape

Across England and Wales, probate practice continues to evolve in response to a combination of pressures: the centralisation of registries, growing case backlogs, heightened fraud risks, and the closure of the Bona Vacantia (BV) list. For private client practitioners, the result is a working environment where delays and uncertainties can complicate even straightforward estates. For public sector teams and local authorities, the loss of established routes for unclaimed estates has created additional hurdles.

These challenges formed the focus of our recent webinar, *Wills, Probate and Bona Vacantia: Managing Estates in a Changing Landscape*. The discussion highlighted a shared reality: practitioners are expected to progress matters efficiently and securely, yet the resources and systems available to them are shifting. Fraudsters are becoming more sophisticated, beneficiaries are increasingly aware of their rights, and local authority teams are working under tighter constraints.

In this environment, the role of probate genealogists is no longer a niche extra but a core safeguard. Independent, professional genealogy ensures that estates are administered correctly, families are properly traced and supported, and practitioners are protected from reputational, financial, and legal risks.

The following anonymised case studies, drawn from recent Finders International experience, illustrate the real-world impact of these pressures and the ways in which collaborative, professional genealogy can resolve them.

Case Study One: Ms A

When Ms A passed away, the estate was referred to the BV list after significant delay. She was survived by three nephews, but relationships between them were strained, and none had been formally notified of their aunt's passing until much later.

One nephew, who had enjoyed a particularly close bond with Ms A, was dismayed to learn that he had not been contacted earlier. He later told us that he had even asked local authorities and police in the past to register him as next of kin for notification purposes, but when the time came, his wish was overlooked.

The frustration was compounded by the timeline. Ms A passed away in mid-2019, but the case was not referred to the BV until August 2021. By the time Finders International became involved, more than two years had elapsed, leaving surviving relatives bewildered and upset.

Challenges Identified

- Delay in referral created unnecessary distress
- Family tensions required careful and sensitive handling
- A missed opportunity for next of kin to be involved in funeral arrangements

Finders' Role

Finders International located and contacted the surviving nephews swiftly. Our experienced case managers provided sensitive communication, ensuring that despite tensions, each nephew was fully informed of their entitlement and their role in the process. The nephew who had felt excluded expressed relief that, at last, a professional organisation was giving him accurate information and recognition. The family was ultimately able to move forward, with all nephews acknowledged as heirs in line with the rules of intestacy.

Lessons for Practitioners

This case underlines the risks that can arise when councils delay referrals or fail to seek professional support at the right time. Not only can this cause reputational damage, but it may also increase the likelihood of complaints or challenges from excluded relatives. For solicitors, instructing a professional genealogy firm early can prevent these difficulties and demonstrate best practice in client care.

Administrator Search & Heir Location Services

When a local authority, deputy, or solicitor is faced with uncertainty over next of kin, Finders can provide a free administrator search and full beneficiary location service. Acting early ensures estates are progressed efficiently, families are contacted promptly, and risks of complaint or reputational harm are reduced.

Get ahead and contact us at quotes@findersinternational.com for expert advice.

Case Study Two: Mrs E

The estate of Mrs E, referred by a county council, illustrates another risk: confusion created when multiple genealogy firms are involved without coordination.

Following her death, extended family members were identified and signed up by two separate firms. Each contacted the council, presenting their own findings and clients. The result was a period of uncertainty and duplication, with the estate claimed by relatives who were not in fact the closest heirs.

During this time, Finders International was instructed to conduct an independent search. Our team traced a nephew living in the United States, someone entirely overlooked by the other firms. As the closest surviving relative, he was in fact higher entitled than the claimants already advanced by others.

The discovery meant that a previously obtained grant had to be revoked. Mrs E's estate, which had seemed at risk of misdistribution, was secured for the rightful heir.

Challenges Identified

- Competing claims created confusion and delay
- Extended relatives were wrongly presented as closest heirs
- Cross-border research was required to locate the rightful heir

Finders' Role

Our dedicated international team quickly identified the overlooked nephew in the USA. With a network of researchers across multiple jurisdictions and experience in handling cross-border estates, we ensured the family line was correctly verified.

Throughout the process, we kept the instructing council and associated practitioners informed, reducing the risk of further duplication and securing the estate for the lawful heir.

Lessons for Practitioners

This case highlights the importance of independent verification. Where multiple claims are made, or where family members are scattered across jurisdictions, a rigorous approach to family tree verification is critical. Without it, practitioners risk liability for incorrect distribution and families risk losing their rightful inheritance.

Risk Management & Compliance Support

From Missing Will Searches to Aviva Insurance policies, Finders International helps solicitors and local authorities mitigate risk at every stage of estate administration. Our services are designed to ensure compliance, protect reputations, and deliver peace of mind.

Reach out to us at LSS@findersinternational.com.

Linking to the Webinar Themes

The discussion during our recent webinar reinforced these points. Practitioners agreed that will searches and genealogy are no longer optional extras; they are essential safeguards. Fraud risks are real, beneficiaries are alert to their rights, and courts expect due diligence.

Speakers emphasised that:

- Simple steps such as caveats or Land Registry alerts can protect estates
- Local authorities should consider applying as creditors to secure their claims, particularly in relation to care fees
- The probate court cannot carry the burden alone, and practitioners must implement stronger checks

In this context, professional genealogy is not just about finding heirs, it is about building resilience into estate administration.

Conclusion: Supporting Practitioners in a Complex Landscape

For solicitors, deputies, local authorities, and other professionals managing estates, today's landscape is more challenging than ever. Probate delays, fraud risks, and the closure of the BV list have heightened the importance of due diligence and proactive case management. The experiences of Ms A and Mrs E demonstrate both the risks and the solutions. In one case, delayed referral caused distress to heirs; in another, multiple claims risked misdistribution. In both, Finders International provided the clarity, independence, and sensitivity required to resolve matters correctly.

Our message is clear: probate genealogy is not an optional extra but an essential safeguard. By working with Finders International, practitioners can progress estates efficiently, protect themselves from liability, and ensure families are treated fairly.

Whether you are handling a private client matter, working under a Deputyship order, or managing a public referral, Finders International can provide clear, independent solutions. From heir location to family tree verification and missing asset searches, we help estates progress efficiently and securely.

Visit our website at www.findersinternational.com.