How do I gather financial information as an executor, attorney or deputy without being able to conduct my usual investigations?

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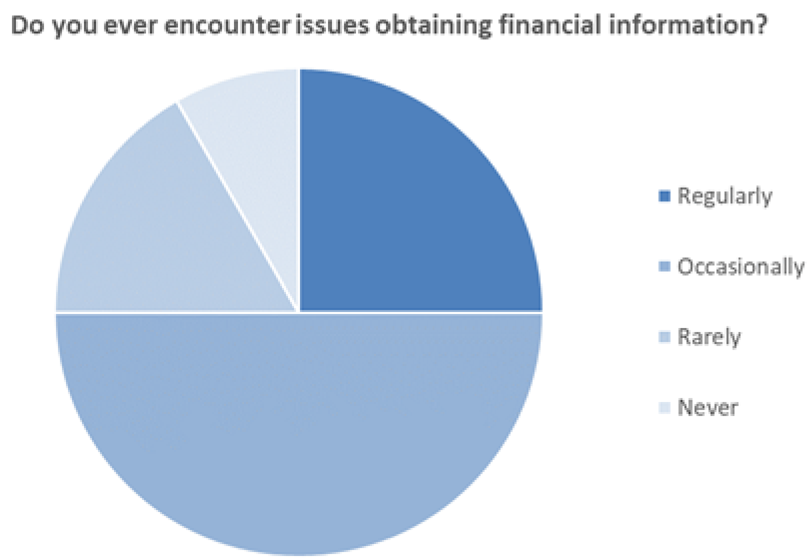
The Law Society Gazette, published by the Law Society of England and Wales, recently reported applications for grants of probate had fallen by 50 per cent since the beginning of UK lockdown. Initially this seems counter-intuitive, given that the BBC reported a spike in mortality at the beginning of April 2020. A casual review of social media channels would indicate that many private client practitioners are busier than ever.

One of the key reasons cited in *The Law Society Gazette* was the difficulty for professionals and their clients in accessing the deceased’s personal papers. Recent guidelines and travel restrictions have made it difficult to search the deceased’s property for personal papers. Where the death could be linked to Covid-19, it is perhaps inadvisable for companies to send employees into that environment. Equally, newly appointed deputies or attorneys may be ill-advised to enter a care home or vulnerable person’s household, due to the inherent risk of exposing themselves and their client.

An inability to readily access the deceased's files is likely to result in delays in probate applications. While professionals may continue to see an increase in new probate enquiries, if families are unable or unwilling to obtain and deliver records, then these cases are likely to experience delays. This creates a particular issue for professionals who are appointed as the executor or deputy and owe a legal duty of care to administer the estate effectively.

Equally, firms may see a reduction in new probate enquiries, if lay executors or administrators delay seeking professional advice or legal assistance while they don't have access to records.

Notwithstanding the current Coronavirus outbreak, in a recent poll during our latest webinar, 92 per cent of legal professionals reported having experienced difficulties obtaining financial information, with 25 per cent reporting they regularly faced challenges gathering information about an estate. Indeed, Estatesearch has observed an increase in the number of enquiries asking for help to remotely investigate estate affairs due to the challenges imposed.



So what action can professionals take, and hence offer to their clients, to help remotely gather information in respect of an estate? There are several options available to executors, administrators, deputies or attorneys which we discuss in full detail on our **blog**

The Modern Practitioners Toolkit

Professionals have a valuable role to play in educating and connecting clients with the various emerging services designed to aid estate administration, which is the topic of our latest webinar series The Modern Practitioners Toolkit.

Now, more than ever, it is important for practitioners to be aware of emerging tools and services to be able to offer best possible service and overcome challenges. We're pleased to have launched this series of ten-minute coffee break webinars, aimed at sharing knowledge and experience of new and emerging tools to support you and your clients as executors, administrators, deputies or attorneys.

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Working with legal professionals for over 10 years, Ben Furlong has focused on understanding the challenges faced in the profession to help design, build and implement technology led solutions to improve procedures, reduce risk and deliver better client outcomes. Ben can be contacted at linkedin.com/in/ben-furlong or on Twitter @estaterisq

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