Wind up an estate

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Each estate matter keeps the deceased's details, what the estate holds and owes, and every payment in and out. From that Desk makes the estate accounts and gets the figures ready for the probate application or, in Scotland, confirmation.

Before you start
An admin switches on the **Wills and probate** pack first. See Switch on a pack.

1 Start the estate

Go to **Matters**

Open the matter and choose **Estate** down its side. Choose **Whose law it's wound up under** and press **Start**.

2 Add the deceased's details

Under **Deceased**, fill in their names, last address, dates of birth and death, and whether there's a will. Add each executor with their name and address, then press **Save**.

3 List the assets and liabilities

Under **Assets and liabilities**, add each one with its **Description**, its **Value at death** and **Where it is**. When an asset is sold, add what it was **Realised for**.

4 Record money in and out

Under **Money in and out**, add each receipt and payment with its **Amount** and date, and say whether it's **Capital** or **Income**.

5 Make the accounts

Under **Accounts**, press **Make the accounts**. Desk files them on the matter as a PDF, from assets at death through to what's left to distribute. Press **Make them again** after any change.

6 Get ready for probate or confirmation

In England and Wales, **Probate application** lists each figure the application asks for, with **Copy** beside it. In Scotland, **Confirmation** checks the C1 and C5 figures against the inventory and tells you anything still to fill in.

If something goes wrong

A confirmation check says the C1 total doesn't match the inventory.
An asset is missing, has no value, or the C1 total was typed differently. Check the assets list and the **C1 inventory total** under **Deceased**.