



Title
Research



Proud winners of Probate Research
Firm of the Year at The British Wills
and Probate Awards 2022



Support services for legal professionals

Title Research provides specialist outsourced support to estate administrators across two core areas:

Probate genealogy




- **Missing beneficiaries:** UK and overseas
- **Intestate estates:** Reconstructing family trees to establish all entitled kin or verification of existing family trees (a free initial assessment can be provided)
- **Missing Beneficiary Indemnity Insurance:** All of our research is suitable for insurance and we are regulated by the FCA to mediate on behalf of the estate to obtain suitable policies
- **Administrator Search:** We can assist with locating Administrators for estates where there is no known next of kin
- **Statutory Will Research:** We can assist in establishing the next of kin who may need to be informed that a Statutory Will is being written
- **Documents:** We can help obtain records of birth, marriage, and death in the UK and overseas

Fees and methodology

- We charge on either a fixed fee or time and expense basis
- We only take instruction from Personal Representatives and do not enter into contracts directly with beneficiaries
- All cases are managed utilising a market-leading practice management system

Managing assets in estates

- **North American shareholdings:** We have many years of experience dealing with North America, including the transfer and sale of holdings; Medallion Guarantee Stamps; obtaining Federal Tax Clearance; and escheatment claims
- **UK Shares:** We can assist with the transfer or sale of UK listed shareholdings
- **Probate Valuation and Verification:** We can assist with valuing holdings as of date of death, as well as verifying their status and how they are held for UK and overseas listed holdings
- **Grants and Reseals:** We have a network of international partners that can support with obtaining foreign Grants or resealing existing Grants or Confirmation
- **Financial Asset Search** (powered by Estatesearch): Search across 450 databases held with over 150 financial institutions in the UK to assist in locating a Deceased's assets
- **International Bankruptcy Searches:** Verify the insolvency status of beneficiaries residing in over 70 jurisdictions
- **International Currency Transfers:** A fast and cost-effective solution to transferring funds to and from overseas jurisdictions

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Technical presentations

To further support your continuing competence, Title Research can assist you by ensuring your knowledge remains up to date with our technical presentations on various estate administration topics.

The technical presentations include:

1 Missing Beneficiary Indemnity Insurance: Obtaining cover and managing risk

- The types of cover available and costs
- Obtaining insurance and what insurers look for
- How missing beneficiaries are found
- Resolving intestate estates
- Mitigating risk – what’s required and costly mistakes
- What can be insured in estate administration

3 Managing assets in estate administration

- What can be outsourced to a specialist
- Identifying assets
- A closer look at Financial Asset Searches in the UK
- Overseas assets
- UK assets
- International money transfers
- Case studies




2 Intestacies: The risks and opportunities

- Why intestacies occur
- Intestacy rules
- A step-by-step walk-through of a family tree reconstruction
- Bona Vacantia in England and Wales
- The business opportunity for legal firms

4 The estate administration timeline

- Identifying assets – UK and overseas jurisdictions
- Overseas assets
- Identifying and verifying beneficiaries
- Unclaimed estates
- Next steps after distribution

Interested in finding out more?

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