

Beneficiary Communication Pack

Ready-to-Use Letter Templates for Executors

These templates help you communicate clearly and professionally with beneficiaries throughout the estate administration process. Simply fill in the details in [square brackets] and send.

Template 1: Initial Notification Letter

Use this letter to inform beneficiaries that they are named in the will and that you are acting as executor.

[Your Name] [Your Address] [Date]

Dear [Beneficiary Name],

Re: Estate of [Deceased Full Name], deceased

I am writing to let you know that I have been appointed as the executor of the estate of [Deceased Full Name], who passed away on [Date of Death].

I can confirm that you are named as a beneficiary in [his/her] will. I wanted to reach out early to let you know that I am in the process of applying for a Grant of Probate, which gives me the legal authority to administer the estate.

The probate process typically takes 6-10 weeks from the date of application. Once the Grant is issued, I will be able to collect the estate assets, settle any outstanding debts, and distribute the estate in accordance with the will.

I will keep you informed of progress. In the meantime, please do not hesitate to contact me if you have any questions.

Yours sincerely,

[Your Name] Executor of the Estate of [Deceased Full Name]

Template 2: Progress Update Letter

Use this letter to update beneficiaries on the status of the estate administration.

[Your Name] [Your Address] [Date]

Dear [Beneficiary Name],

Re: Estate of [Deceased Full Name] — Progress Update

I am writing to update you on the progress of the estate administration.

Current status: [Choose one or more of the following]

- The Grant of Probate was issued on [date]
- I am currently collecting the estate assets from banks and financial institutions
- I am awaiting responses from [number] institutions
- All debts have been settled / I am in the process of settling outstanding debts
- I expect to be in a position to distribute the estate within [timeframe]

Next steps: I will write to you again once I am ready to make the final distribution. Before doing so, I will provide you with a full set of estate accounts showing all money received and paid out.

If you have any questions in the meantime, please do not hesitate to contact me.

Yours sincerely,

[Your Name] Executor of the Estate of [Deceased Full Name]

Template 3: Final Distribution Letter

Use this letter when you are ready to distribute the estate to beneficiaries.

[Your Name] [Your Address] [Date]

Dear [Beneficiary Name],

Re: Estate of [Deceased Full Name] — Final Distribution

I am pleased to inform you that I am now in a position to distribute the estate of [Deceased Full Name].

Please find enclosed a copy of the estate accounts, which show all assets collected and debts paid during the administration.

Your entitlement under the will is: [Description of what they inherit — e.g., “a pecuniary legacy of £X” or “a one-third share of the residuary estate, amounting to £X”]

I will arrange for payment of £[amount] to be transferred to your bank account. Please confirm your bank details below and return this letter to me:

- Account name: _____
- Sort code: _____
- Account number: _____

Alternatively, if you would prefer a cheque, please let me know.

I would also be grateful if you could sign and return the enclosed receipt, which confirms you have received your inheritance. This protects both of us and formally closes the estate.

Yours sincerely,

[Your Name] Executor of the Estate of [Deceased Full Name]

Template 4: Receipt for Beneficiary to Sign

Enclose this with your final distribution letter. Ask beneficiaries to sign and return it.

RECEIPT AND DISCHARGE

I, [Beneficiary Name], of [Beneficiary Address], acknowledge that I have received from [Executor Name], the executor of the estate of [Deceased Full Name], deceased, the sum of **£[Amount]** in full and final satisfaction of my entitlement under the will of the said [Deceased Full Name] dated [Date of Will].

I confirm that I have examined the estate accounts and approve them.

I hereby release and discharge the executor from all claims and demands in respect of the administration of the said estate.

Signed: _____

Date: _____

Print name: _____

Template 5: Letter to Beneficiary Regarding Property Transfer

Use this when a property is being transferred to a beneficiary rather than sold.

[Your Name] [Your Address] [Date]

Dear [Beneficiary Name],

Re: Estate of [Deceased Full Name] — Property at [Property Address]

Under the terms of the will, the property at [Property Address] is to be transferred to you.

Now that the Grant of Probate has been issued, I am able to arrange for the legal transfer of the property into your name. This requires a formal deed of assent to be prepared and registered with the Land Registry.

I have arranged for this to be handled by [Solicitor Name / Probate Direct's property transfer service]. They will be in touch with you directly to arrange the paperwork.

Please note that you will be responsible for all ongoing costs associated with the property (rates, insurance, maintenance) from the date of transfer.

If you have any questions, please do not hesitate to contact me.

Yours sincerely,

[Your Name] Executor of the Estate of [Deceased Full Name]

Tips for Communicating with Beneficiaries

1. **Be prompt** — beneficiaries appreciate regular updates, even if there is nothing new to report.
 2. **Be transparent** — share the estate accounts openly. Secrecy breeds suspicion and disputes.
 3. **Be professional** — even if beneficiaries are family members, keep communications formal and in writing. This protects you if questions arise later.
 4. **Keep copies** — retain a copy of every letter you send and receive. Store them with the estate papers for at least 12 years.
 5. **Don't make promises about timelines** — say “I expect” or “I hope” rather than “I will” when it comes to dates, as delays can occur with banks and institutions.
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These templates are provided by Probate Direct NI as general guidance. They do not constitute legal advice. For complex estates or disputes between beneficiaries, seek independent legal advice.