



Claiming back money from wills, estates and trust funds

If you need this guidance in a language other than English or in alternative formats, please [contact us](https://upgrade.sra.org.uk/contact-us) and we will provide it for you. If you need extra help with making a claim we will work with someone who has your permission to represent you, such as a new solicitor or legal advisor, or a member of [Citizens Advice](http://www.citizensadvice.org.uk/) or other support agency.

This page relates to claiming money relating to the [estates](https://upgrade.sra.org.uk/consumers/using-solicitor/legal-jargon-explained#estate) of the deceased and to money from trust funds.

If the legal adviser is the only [executor](https://upgrade.sra.org.uk/consumers/using-solicitor/legal-jargon-explained#executor) or administrator of the [will](https://upgrade.sra.org.uk/consumers/using-solicitor/legal-jargon-explained#will) or trust fund, you may need to replace them with a new legal advisor qualified to do the work before we can deal with your application. Please [contact us](https://upgrade.sra.org.uk/contact-us) before doing so.

What we need from you

We will need

- copies of the most recent estate accounts
- copies of any bills the legal adviser may have delivered
- a copy of the will or trust deed
- a copy of the grant of [probate](https://upgrade.sra.org.uk/consumers/using-solicitor/legal-jargon-explained#probate) or letters of administration, and
- copies of any ledger sheets the legal adviser kept—you can obtain this from the agent we asked to close the firm: if they do not have it, please [contact us](https://upgrade.sra.org.uk/contact-us), as we may be storing it.

What if the estate accounts are out of date, challenged or missing?

You will need to prepare a cash statement. This is because we need to know the actual amount for which the legal adviser has failed to account to you.

You must also send us supporting [evidence](https://upgrade.sra.org.uk/consumers/using-solicitor/legal-jargon-explained#evidence), such as

- a letter from the person making the payment to the legal adviser, or
- the legal adviser's account slip to show they have received the money.