

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://www.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 of the deceased and to money from trust funds.

If the legal adviser is the only executor or administrator of the 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://www.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 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://www.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What if the estate accounts are out of date, challenged or missing?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, 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.