AUGE HORIZON
NOTAIRES

Notaires de France

INHERITANCE / ESTATE
DOCUMENTS TO PROVIDE TO THE NOTAIRE

Documents relating to the deceased

- the three original death certificates issued by the town hall or funeral director
- the original identity card, passport or residence permit
- copy of the French health insurance card (carte Vitale)
- the original family record book (livret de famille)
- the duly completed civil status questionnaire
- and, where applicable:
  - copy of the marriage contract or PACS agreement
  - copy of the deed recording a change of matrimonial property regime
  - copy of the legal separation or divorce judgment
  - the original will
  - copy of any gift between spouses (donation entre époux)

Documents relating to the surviving spouse (where applicable) and each heir

- copies of identity cards, passports or residence permits
- copies of family record books (livrets de famille)
- the duly completed civil status questionnaire(s)
- and, where applicable:
  - copies of marriage contracts or PACS agreements
  - copies of deeds recording changes of matrimonial property regime
  - copies of legal separation or divorce judgments

Documents relating to the deceased's estate

- **Real property**
  - list, with addresses, of the properties belonging to the deceased and/or their spouse
  - title deeds for the properties belonging to the deceased and/or their spouse
  - any available property valuations (if none are available, the notarial practice can value the properties)

- name and address of the bank and details of the loan taken out to acquire the property
- copies of the property tax and residence tax notices (taxe foncière and taxe d'habitation)
- <u>If a property is held in co-ownership or is situated in a housing development</u>
  - name and address of the co-ownership managing agent (syndic), or of the representative of the owners' association (association syndicale libre) in the case of a housing development
  - the co-ownership regulations, or the specifications / regulations of the housing development
  - the latest service-charge demand
- <u>If a property is let</u>
  - copy of the tenancy agreement,
  - amount of the latest rent.
  - amount of the security deposit.

- **Bank accounts and investments**
  - details of the deceased's and their spouse's personal and joint bank accounts (where they were married under a community property regime), together with the latest statements
  - details of securities accounts held with a bank or stockbroker (shares, bonds, SICAVs, mutual funds, etc.), together with the latest statements
  - details of savings accounts (savings books, sustainable development savings account, home savings account, home savings plan, etc.), together with the latest statements
  - details of any employee savings plan (plan d'épargne entreprise), together with the latest statements.

- **Motor vehicles**
  - vehicle registration certificate (carte grise)
  - Argus market value

- **Life insurance**
  - copies of the deceased's and their spouse's policies
  - contact details of the insurance companies

- **Pension funds**
  - list of the deceased's pension funds and membership/reference numbers

- **Employer**
  - the last three payslips
  - statement of the employee profit-sharing account

- **Shares in a civil or commercial company in which the deceased (or their spouse) was a shareholder / member**
  - the up-to-date articles of association and, where applicable, any deeds transferring shares
  - the Kbis extract
  - contact details of the accountant, in particular so that the value of the shares can be determined

- **Business, craft or professional practice**
  - title / deed of acquisition
  - the Kbis extract
  - registration with the French trades register (répertoire des métiers)
  - contact details of the accountant, in particular so that the value of the business can be determined

- **Units or shares in SCPI (French property investment companies), GFA (agricultural landholding groups), GFV (vineyard landholding groups), woodland and forestry interests, other agricultural companies and timeshare interests**
  - the up-to-date articles of association and, where applicable, any deeds transferring shares
  - the share/unit certificate, where applicable.