

# PARTNER WITH A TRULY INDEPENDENT FIRM WHOSE EXPERIENCE, SKILLS AND RESOURCES CAN HELP YOU:



**TRACE MISSING  
BENEFICIARIES**



**RECOVER AND REALISE  
UNCLAIMED ASSETS**



**MITIGATE TIME AND  
CASE PRESSURE**

In recent years, Treethorpe has successfully and increasingly applied its expertise and resources towards assisting Local Authorities in identifying and tracing the beneficiaries of estates following the death of a client.

The following case summaries provide a brief insight into some of the support we can provide, the varied nature and expertise of the work we can undertake, and what we can accomplish.

## **1 BREAKING NEWS TO CLOSE FAMILY MEMBERS**

Treethorpe agreed to break the news of the death of K to close family members as they had not been informed at the time. Breaking the news about their brother's death wasn't easy, each call had to be accomplished with a great deal of care and empathy. The most difficult call was to K's twin brother S, who although lived just 10 miles away, had no idea that his brother had died.

This case was made complex when we discovered that none of the family would speak to each other; due to a rift which had fragmented the family many years prior. Due to our impartiality, and to help with the difficult circumstances caused by this rift, we offered to act on the family's behalf. The family welcomed our support and this enabled us to progress with recovering their entitlements in a swift and satisfactory manner, for all involved.

## **2 RESEARCHING AND CONTACTING A LARGE FAMILY**

D was a bachelor with no children, he had passed away in a nursing home with no known next of kin and was an only child of deceased parents. Treethorpe traced his aunts, uncles, cousins and first cousins once removed. They all remembered D but hadn't had any contact with him for many years and weren't aware that he had passed away. In total, 21 beneficiaries were traced, many of whom had no contact with, or knowledge of, each other. Through our relationship building and client focused approach, Treethorpe managed to ensure they all agreed on using the same family member to act as their personal representative.

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### 3 PERSONALLY VISITING FAMILY DUE TO NO RESPONSE

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R died in care, the council were unable to make contact with his family and so referred the case to Treethorpe. Prior to going into care, R had lived with his mother and sister H, and had had another sister W, who died. We discovered that his mother had passed away and his sister H had moved house. We sent letters to H that went unanswered, and so went to visit her in person. We found H living with her elderly aunt and discovered H had a disability and having been cared for by her mother, had moved in with her aunt upon her mother's demise.

As neither had kept in touch with R they were unaware of his death, and understandably upset by the news, though were grateful to have been informed. They let us know that sister W had a daughter, with whom they had lost contact with, and she would also need to be informed. Using an old address book, they found a previous address for her and let us know that the last they knew she was studying law in London. With this information we were able to trace her and inform her of K's death.

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### 4 RESEARCH USING FAMILY RECORDS

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L was a bachelor and his only prized possession when he died was an invitation to a Graduation Dinner and Dance for the No.33 Air Navigation School, Royal Air Force at Mount Hope, which had belonged to his brother. Sadly after graduating in February 1944 his brother had lost his life when his plane was hit by flak and flew into a hill on 1st January 1945. By researching the death of his brother, we discovered a short descriptive article on his life which confirmed who his parents were. This greatly assisted Treethorpe in tracing the beneficiaries to this gentleman's estate.

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### 5 REUNITING FAMILY

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Family fallouts are sometimes inevitable and in this case three siblings went their separate ways. It was not until Treethorpe were requested to trace the beneficiaries of one of the siblings that we were able to reunite the sole surviving uncle with his two nieces, whom he had not seen for over 30 years.



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