

1. Please provide the name, job title and email address of the person who oversees the Deputyship Team.

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2. Has the council's Deputyship Team used a heir hunter, tracing agent or genealogical researcher to trace relatives? **Yes**

IF THE ANSWER TO QUESTION 2 IS 'YES', PLEASE ANSWER ALL OF THE FOLLOWING QUESTIONS:

3. Which researcher is used? **Treethorpes / Fraser and Fraser / Finders / Estate Research**

4. On how many occasions in the past 3 years has the Deputyship Team used a heir hunter to trace relatives? **Multiple occasions, currently 33 outstanding cases with 'heir hunters'**

5. How many times was the researcher used in respect of a client who was living? **rarely**

6. How many times was the researcher used in respect of a deceased person? **Multiple occasions, currently 33 outstanding cases with 'heir hunters'**

7. When the Court of Protection appoints the council a public deputy for an individual who lacks capacity and that individual subsequently dies, does the council's Deputyship Team continue to hold and manage the funds belonging to the deceased until a Personal Representative ('PR') takes over the administration of the estate? **Yes**

8. If not, please state to which department in the council the Deputyship Team transfers the funds and responsibility for the funds? **N/a**

9. If the answer to Question 7 above is that the Deputyship Team do continue to hold the funds pending appointment of a PR, please stipulate the statutory power to do so. **Duty of care to the estate and ensuring funds are distributed to the service user's beneficiary**

10. I understand that where the deceased has lost contact with their family members there may be a period of time while relatives are being traced. During this intervening period, does the council department holding the funds and responsibility for the funds pay any of the following debts from the estate of the deceased:

a. the cost of the funeral and any officer time spent arranging it? **Cost of funeral only we do not apply a charge for the deputyship officers time. However we charge a standard winding up fee of £375**

b. mortuary costs? **We would pay the funeral bill**

c. any cost involved in tracing estranged next of kin? **We would trace them but not apply a charge**

d. other expenses payable following death such as house clearance or outstanding care home fees? **Yes we would pay these**

11. Does the council in any way charge the estate of the deceased for officer time spent on the following: **No to all of the below**

a. coordinating with solicitors?

- b. instructing and communicating with genealogical researcher used to trace next of kin?
- c. communication with any NHS Trust or care home (where applicable)?
- d. communication with the district council, where a public health funeral is required?

12. I understand that where the individual lacking capacity dies and a notification of death is made, the Office of Public Guardians ('OPG') may request a final report on the estate from their appointed deputy. From your records over the past 3 years, in what percentage of deputyships ending on the death of the client are these reports requested? [On request from OPG we will provide a report](#)

13. When the Deputyship Team at the council prepares such a final report for the OPG, please clarify the following:

a. does the report end at the date of the service user's death or, if not, for how long after the death does it extend? [Up to death](#)

b. does the final report include a record of funeral and mortuary costs deducted from the estate? [No, only up to death](#)

c. does it include other expenses paid from the estate by the council following the death such as final care home fees, house clearance, costs relating to tracing next of kin and/or officer time spent on things other than arranging the funeral? [No, only up to death](#)

14. In relation to the specific process of paying any outstanding fees or costs from the estate of the deceased:

a. please confirm which department or officer oversees this? [The deputyship officer they had during their life](#)

b. what is the policy for the assessment of such payments? [Unclear what the question is asking.](#)

c. please provide copies of any and all written internal procedures, policies or other guidance documentation relating to this. [No such document available.](#)

15. When a PR is appointed to distribute the estate of the council's former deputyship client:

a. please confirm whether the PR or the solicitor that is instructed for |Probate purposes are provided with a schedule of deductions that have been made. [If requested](#)

b. If so, does this include every payment made by the council from the estate, including those made internally to other parts of the council? [Yes](#)

c. from your records, on how many occasions in the past 3 years has the PR or their solicitor queried or challenged a payment made by the council from the estate, and on each occasion, what type of payment did this relate to? [None known](#)