

Frequently Asked Questions

GENEALOGY OFFICE

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■ Presentation of the Office

The Genealogy Office ADD & Associés, founded in 1990, specialises in national and international probate genealogy and boasts recognised expertise in kinship. The Office comprises a team of professional genealogists led by three associates - Antoine Delabre, Véronique Cantegrel, and Antoine Djikpa, plus five subsidiaries headed by five associate directors - Laurent Martino, Didier Pierson, Pierre Coyola, Jérôme Bernard and Renaud Lacombe.

The Office has locations in 13 regions of France and is also established in Spain, Poland and Vietnam.

■ What a probate genealogist does

A probate genealogist carries out an in-depth study and uses his means of investigation to:

1

- trace heirs,
- confirm uncertain or incomplete devolutions of estate (inheritance).

2

- justify the rights of the heirs traced,
- represent them in the administration of the estate.



Frequently Asked Questions :,,

1. Why a genealogist?

Pursuant to Article 36 of the French law of 23 June 2006 reforming inheritance and gifts, we may be appointed by: "any person who has a direct and legitimate interest in the identification of heirs or the administration of the estate".

2. Why doesn't the notary do the research himself?

A notary does not have the resources needed to do such research which frequently demands travelling, both in France and abroad. In addition, most of the steps we take require the expertise of professional researchers holding administrative authorisations, particularly to access civil registers.

3. What role do you play?

- We trace heirs and inform them of the origin of their rights,
- We prove rights of heirs by producing a certified family tree chart that will be used by the notary to draft the affidavit of inheritance (document officially establishing the list of heirs),
- We represent the heirs under a power of attorney. This means they don't need to travel to be present, it exempts them from the formalities required for the administration of the estate and gives them the benefit of an experienced professional,
- In our capacity as their representative, we keep the heirs informed of all the key steps in the administration of the estate and the operations carried out,
- We obtain the heirs' prior agreement to any deed of disposal (sale, licitation, partition, etc.).

4. What guarantees does your contract offer me?

- The Office is a member of the Chambre Nationale des Généalogistes (French national chamber of genealogists) and a signatory of the Partnership Convention with the French Notariat,
- The Office also has a professional third-party liability contract with Covea Risks,
- In the performance of his/her duties, the genealogist optimises the administration of the estate in the common interests of the parties.

5. How is the estate administered?

Once the research complete, we send the notary a complete file (certified family tree chart, civil status documents, powers of attorney, etc.).

The various steps at the notary's:

- Signing of the affidavit of inheritance,
- Inventory of moveable property if required,
- Valuation of real-estate where applicable,
- Sales of moveable property and real-estate after obtaining the consent of all the heirs as to the principle and price of the sale,
- Closing of bank accounts and collection of amounts, liquid assets, shares, life insurance, etc.,
- Payment of the estate's debts,

- Signing of the declaration of estate and payment of inheritance tax,
- Calculation of the accounts which are submitted to you for approval after funds have been received from the notary.

6. Do I need to advance any payments?

No. We advance all the expenses through to the final settlement of the case (these expenses remain payable by us in the event that the debts absorb the assets, or that a will or closer heirs are discovered).

7. How are your fees calculated?

Fees are calculated as a percentage of the share reverting to the heir as provided in the contract for tracing succession or the contract evidencing rights. This percentage varies with the degree of kinship and the size of the share received.

8. When will I be informed of the assets in the estate?

The assets and liabilities are known in part when we begin our research. Through appointments at the notary's and the inventory done at the home, we are able to clarify the amounts.

9. How will I receive my money?

In general, we transfer the heirs' share by cheque, or by bank or post office transfer.

10. Do I need to declare the amounts I receive?

No. The amount you receive is net of all fees and duties, as all tax matters are settled beforehand by the notary.

For heirs who live abroad, dual taxation is prohibited either by an international or a bilateral tax treaty.

11. How much is the inheritance tax?

The amount of inheritance tax varies with the degree of kinship and the share you receive. To find out more, consult our website.

12. Who sets the value of the real-estate?

We seek at least two valuations from real-estate professionals. The property will only be sold after you have agreed to the value.

13. What happens to the deceased person's belongings?

The deceased's personal belongings (photographs, clothes, letters, etc.) are not part of the estate. They may be shared out and given to the heirs who ask for them.

14. Why do you need a photocopy of my ID card or passport?

The notary must check that the heirs' signature on the powers of attorney they grant us match their official signature.

If one of these documents is missing, your signature must be legalised by the appropriate authority.

15. Do I need to be there?

No. Thanks to the power of attorney that you grant us, no travel will be necessary. We will represent you in all the settlement operations and keep you precisely informed.

Any important event (setting the sale price, distribution accounts, etc.) will be submitted to you first for agreement.

16. Can I meet you?

We are at your disposal to meet you in our offices or at your home, both in France and abroad.

17. Can you give me the names and contact details of other members of my family?

Like all professionals, we are required to respect the privacy of others. However, if the other persons agree, we can send you their contact details. We can also forward any correspondence to them that you wish to send.

18. Can I get a copy of the family tree chart?

Once our file is complete, we can send you a copy of the family tree chart if you ask us to. However, the contact details of the heirs will not be disclosed.

19. What documents do I need to provide so that you can claim my rights?

- A photocopy of an official document signed by you (ID card, passport, driving licence, etc.) or the legalisation of your signature by a notary or by the nearest French Consulate to you.
- If you have three or more children: a photocopy of your family book (livret de famille) or your children's birth certificates. This document will entitle you to a reduction in inheritance tax.
- For foreign heirs: Your birth and marriage certificates.

For more information, consult our website:

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