



1. Identification documents

- The Will
- Birth and marriage or civil partnership certificates
- Death certificates of a previous spouse(s)
- Divorce papers showing any previous surnames of the deceased
- Any Deed Poll document showing a change of name

2. Benefits and allowances

- State pension
- Tax credits
- Pension credits
- Disability allowance
- Carers allowance

Any other benefit and allowance

3. Bank accounts, savings and investments

- Bank and building society accounts
- Private pension
- Credit cards
- Loans agreements
- Savings accounts
- Investment accounts
- Share certificates

4. Tax

- Tax certificates (e.g. P60)
- Tax returns

5. Property and mortgages

- Property deeds
- Mortgage account details
- Rental agreements

6. Insurance policies

- Life insurance
- Home insurance
- Car insurance

Any other insurance (e.g. health, dental, travel, pet etc.)

7. Bills and regular payments

- Mobile phone
- Telephone/internet provider
- Water
- Gas
- Electricity
- TV licence
- Council tax
- TV subscriptions (e.g. Sky, Virgin)

Any other regular payments/direct debits (e.g. charity donation or club membership)