

What to do when someone dies

Estate Administration and Probate

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 of the deceased

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

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

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

Revisit our [guide](#) if you want to check back and see what to do next. And don't be afraid to reach out for support if you need it.