

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.