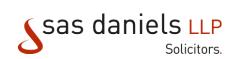
Documents Required Following a Death

SAS Daniels Solicitors



The following checklist is intended to be a guide for those searching for the deceased's papers prior to an initial meeting.

Certificates

Document Information	Enclosed	To Follow	N/A
Death certificate(s) Please forward as many original certificates as possible and let us know the name of the person who paid for the death certificate(s). Name:			
Birth Certificate			
Marriage Certificate If divorced, please include decree absolute.			

The Deceased's Will

Document Information	Enclosed	To Follow	N/A
The original Will, Codicil and any letters or notes along with the Will If you do not hold the original documents, and they are not stored with us, please state where these are held below. Held by:			
A family tree of the immediate family			
Details of deceased's beneficiaries or family members If beneficiaries referred to in the Will, or other family members have already passed away, please provide a note of their dates of death and any death certificates available.			



Deceased's Assets

Document Information	Enclosed	To Follow	N/A
Main residence and other properties Title deeds to main residence and other properties (if applicable)			
Address of other property:			
Address of other property: Buildings and Contents insurance policies Tenancy agreements (if rented) Details of any mortgage and mortgage protection policies			
 Motor car and other vehicles Logbook Insurance papers M.O.T. Certificate 			

Assets in Both Sole and Joint Names

Document Information	Enclosed	To Follow	N/A
 Share certificates, unit trust and PEP statements 			
 Bank statements, standing orders and direct debits 			
Cheque books			
Cheque cards			
Building society passbooks			
Premium bonds			
National savings certificates and bonds			
National savings account passbooks			
Life policy documents			
Uncashed cheques			
Cash held			



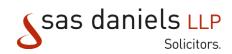
•	Post office pension card and statements		
•	P60 and other pension details		
•	Details of personal effects and where they are stored		
•	Nursing home refunds		
•	Other refunds due		
•	Salary information		
•	Unquoted shares		
• Name:	Name and address of financial adviser (if applicable)		
Addres	SS:		
•	Name and address of stockbroker (if applicable)		
Name:			
Addres	SS:		

Debts and Liabilities

Document Information	Enclosed	To Follow	N/A
Mourners refreshments			
Obituary notices			
Unpaid bills			
Utility bills			
Credit cards and statements			
Service charges and ground rents			

Tax Returns and Other Tax Details

Document Information	Enclosed	To Follow	N/A
National Insurance (NI) number Please provide the deceased's NI number below NI Number:			



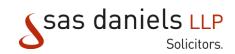
Accountant details		
Name:		
Address:		
PAYE coding notice		
Tax returns		
Dividend vouchers and tax certificates		

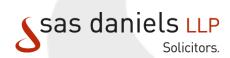
Funeral Account Information

Document Information	Enclosed	To Follow	N/A
 Funeral account Please provide the name and address of the funeral directors below. 			
Name:			
Address:			

Other Information

Docu	ment Information	Enclosed	To Follow	N/A
•	Any gifts made during the last seven years			
•	Any farm or business interests			
•	Was the deceased a beneficiary of any trust?			
•	Any interest in an unadministered estate			
•	Overseas assets			
Notes	:			
Notes				





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