

List of papers required following a death



www.sasdaniels.co.uk

 **sas daniels LLP**
No ordinary law firm.

List of papers required following a death

The following list is intended to be a guide for clients who are searching the deceased's papers prior to an initial meeting.

1. Death Certificate

- Please forward as many certificates as possible
- Please also let us know who paid for the death certificates:

Enclosed	To Follow	N/A

2. The Deceased's Will

a) Please forward the original Will, Codicil and any letters or notes with the Will.

- If you do not hold the original documents and they are not stored at this firm, please state where these are held:

Held by: _____
 Address: _____

--	--	--

b) A family tree of immediate family

c) Details of the deceased's beneficiaries or family members. (If any beneficiaries referred to in the Will or other family members have already died, please provide a note of their dates of death and any death certificates available.)

3. Funeral Account

- Please let us have the name and address of the funeral directors:

Name: _____
 Address: _____

--	--	--

List of papers required following a death

4. Deceased's residence and other properties

- Title deeds to main residence
- Title deeds to other properties:

Address for other property: _____

Address for other property: _____

- Buildings and Contents insurance policies
- If rented, any Tenancy Agreements
- Details of any mortgage and mortgage protection policies

Enclosed	To Follow	N/A

5. Motor car and other vehicles

- Logbook
- Insurance papers
- M.O.T Certificate

Enclosed	To Follow	N/A

6. Birth and Marriage Certificate. If divorced please include the decree absolute.

--	--	--

List of papers required following a death

7. Assets in both sole and joint names (Continued)

- Unquoted shares
- Name and address of any Financial Adviser:
Name: _____
Address: _____

- Name and address of any Stockbroker:
Name: _____
Address: _____

Enclosed	To Follow	N/A

8. Debts and liabilities

- Funeral Account
- Mourners refreshments
- Obituary Notices
- Unpaid bills
- Utility bills
- Credit cards and statements
- Service charges and ground rents

Enclosed	To Follow	N/A

9. Tax details

- National Insurance Number: _____
- Accountant details:
Name: _____
Address: _____
- PAYE Coding Notice

Enclosed	To Follow	N/A

--	--	--

List of papers required following a death

9. Tax details (Continued)

- Tax returns
- Dividend Vouchers and Tax Certificates

Enclosed	To Follow	N/A

10. Other details

- 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

Enclosed	To Follow	N/A

Notes:

Thank you.

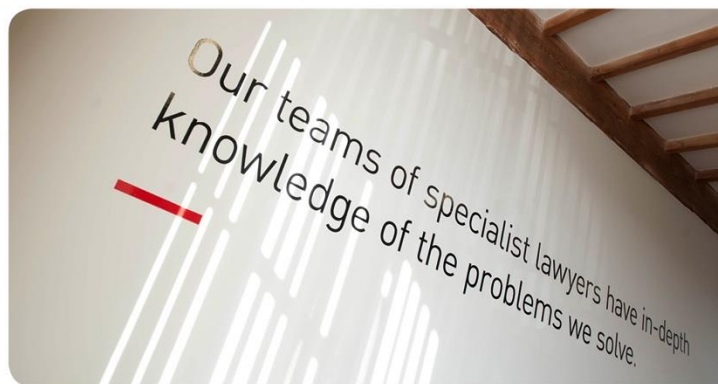
For any enquires please contact:

Helen Gowin

Partner

t. 01260 282351

e. helen.gowin@sasdaniels.co.uk



www.sasdaniels.co.uk

 **sas daniels LLP**
No ordinary law firm.

SAS Daniels LLP is a Limited Liability Partnership registered in England and Wales with registered number 0C333138. A list of members is available at our registered office, 30 Greek Street, Stockport, Cheshire, SK3 8AD. SAS Daniels LLP is authorised and regulated by the Solicitors Regulation Authority.