

The following is a checklist to help executors/family gather relevant papers after a person has died ahead of their first meeting with a Solicitor.

Most common matters

- Full Extract death certificate (not abbreviated version)
- Extract birth certificate
- Extract marriage certificate (if applicable)
- Contact details for Executors and beneficiaries
- Passport/ driving licence/ National insurance card and Proof of Address being operated prior to death
- Was there a Power of Attorney being operated prior to death?
- The original Will and any Codicils/ Letters of Wishes
- Family details – was the deceased a widow/ widower? If so, when did the spouse die and who dealt with their estate? How many children/ grandchildren do they have – even if estranged? Have any children predeceased the deceased?
- National Insurance number
- Extract death certificate for predeceasing spouse (if applicable)

Details of assets & debts

- Bank/Society statements/ correspondence
- Any investments correspondence – certificate, valuations, bonds, reports
- Property – did the deceased own a house? What is the value? Where are the title deeds?
- Details of home and contents insurance/ Mail redirection – is this required?
- Pension details
- Life policies – policy documents if available
- Any other policies e.g. income, critical illness etc. (policy documents if available)
- Tax return or HMRC correspondence
- Cars – including insurance details and registration documents
- Furniture and personal effects – second hand value of furniture
- Any items of value – jewellery/ antiques – these may need formal valuation
- Mortgage statement or details of lender and account number, if available
- Funeral account/ funeral tea/ funeral flowers
- Care home fees (if applicable)
- Credit card/ store cards
- Any expenses you have incurred e.g. registering the death
- Council tax statement – exemption or discount may be available
- Utilities – electricity/ gas
- Telephone/ mobile statements
- Any other accounts/ debts (including loans from friends/ family)

Less common Matters

- Details of any external advisers e.g. accountant, investment manager or IFA
- Were there any significant lifetime gifts? Particularly if over £3000 in any year
- Was the deceased a beneficiary of a trust?
- Did the deceased set up a trust?
- Foreign assets – holiday home, bank accounts etc.?
- Domicile – did the deceased live or previously live in another country?
- Loans, for example to a family member?
- Business interests – whether in partnership, as a sole trader or through a private company or LLP

If you would like any further information please contact our Lesley Iannarelli on 01383 430111 or lesley@caritaslegal.co.uk