

INFORMATION

THE DECEASED – Full name, occupation and address; date of birth and date of death; whereabouts of Will if not immediately available; any business interests

FAMILY & RELATIVES – Full names and address(es) of any spouse, children, grandchildren and parents; dates of birth for any not yet 18 years of age; dates of death for any who have died. If none of these relatives exist/are living, details of nearest family (e.g. brother, sister, cousin, aunt).

EXECUTORS – Full names, occupations, addresses, day and home telephone numbers, and relationship (if any) to the deceased.

BENEFICIARIES – Full names, addresses and relationships (if any) to the deceased; dates of birth for any not yet 18 years of age.

PROFESSIONAL AND OTHER ADVISERS – Details of any solicitor, accountant, stockbroker, or other adviser known to have been consulted by the deceased.

DOCUMENTATION

NHS Medical Card
Passport & Driving Licence
Birth and Marriage Certificates
All credit and bank cards

CERTIFICATES OF REGISTRATION OF DEATH (Death Certificates)

WILL

Any notes or letters showing deceased’s wishes.
Any documentation relating to any property or investments jointly owned by the deceased and any other person.

Employment pay slips and/or P60s. Pension statements, books or the like. Benefit books, statements of the like. Income Tax return forms. Accountant’s Report or correspondence.

Bank statements and cheque books. Building Society (or similar) pass books and statements. Stock or Share Certificates. Stockbroker’s share valuation or correspondence. Dividend or interest warrants, certificates or statements.

THE ESTATE – Much of the information necessary will come from the documents listed in this form. Information may be required in connection with any property, investments or income of the deceased, particularly if no documentation regarding these is immediately available. The whereabouts of documents, such as title deeds and the like is very helpful.

Information about mortgages, debts, outstanding accounts and other financial commitments is also essential where there is no documentation available.

GIFTS – Details of any gifts of significant value made by the deceased within seven years of the date of death.

JOINT PROPERTY – Details of any property, savings or the like jointly owned by the deceased and someone else.

OTHER MATTERS – Remember to tell your solicitor about any other matter which you think relevant and to raise any questions or worries that you may have.

Insurance policies, insurance company statements. Premium payments books, records, property title deeds, rent book. Car registration documents.
Business records if self employed.

Mortgage accounts and statements.
Bank or other loan or credit agreements, statements.
Electricity, gas and telephone accounts.
Store and credit card accounts.
Trade or Agency accounts and statements.
Funeral account.

Trade or Professional Association or Trade Union membership documents. Club membership cards.
Magazine or book club subscription accounts.

Any legal looking document, however old.
Any valuation documents specifying jewellery, furnishings or the like.
Any correspondence dealing with financial matters received shortly before or since the date of death.

Any jewellery or other small items to be held by the solicitor for safekeeping and/or valuation.
