



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
<ul style="list-style-type: none"> 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: _____			
<ul style="list-style-type: none"> Birth Certificate 			
<ul style="list-style-type: none"> Marriage Certificate If divorced, please include decree absolute. 			

The Deceased's Will

Document Information	Enclosed	To Follow	N/A
<ul style="list-style-type: none"> 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: _____ Address: _____			
<ul style="list-style-type: none"> A family tree of the immediate family 			
<ul style="list-style-type: none"> 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
<p>Main residence and other properties</p> <ul style="list-style-type: none"> Title deeds to main residence and other properties (if applicable) <p>Address of other property:</p> <hr/> <p>Address of other property:</p> <hr/> <ul style="list-style-type: none"> Buildings and Contents insurance policies Tenancy agreements (if rented) Details of any mortgage and mortgage protection policies 			
<p>Motor car and other vehicles</p> <ul style="list-style-type: none"> Logbook Insurance papers M.O.T. Certificate 			

Assets in Both Sole and Joint Names

Document Information	Enclosed	To Follow	N/A
<ul style="list-style-type: none"> Share certificates, unit trust and PEP statements 			
<ul style="list-style-type: none"> Bank statements, standing orders and direct debits 			
<ul style="list-style-type: none"> Cheque books 			
<ul style="list-style-type: none"> Cheque cards 			
<ul style="list-style-type: none"> Building society passbooks 			
<ul style="list-style-type: none"> Premium bonds 			
<ul style="list-style-type: none"> National savings certificates and bonds 			
<ul style="list-style-type: none"> National savings account passbooks 			
<ul style="list-style-type: none"> Life policy documents 			
<ul style="list-style-type: none"> Uncashed cheques 			
<ul style="list-style-type: none"> Cash held 			


<ul style="list-style-type: none"> • Post office pension card and statements 			
<ul style="list-style-type: none"> • P60 and other pension details 			
<ul style="list-style-type: none"> • Details of personal effects and where they are stored 			
<ul style="list-style-type: none"> • Nursing home refunds 			
<ul style="list-style-type: none"> • Other refunds due 			
<ul style="list-style-type: none"> • Salary information 			
<ul style="list-style-type: none"> • Unquoted shares 			
<ul style="list-style-type: none"> • Name and address of financial adviser (if applicable) Name: _____ Address: _____			
<ul style="list-style-type: none"> • Name and address of stockbroker (if applicable) Name: _____ Address: _____			

Debts and Liabilities

Document Information	Enclosed	To Follow	N/A
<ul style="list-style-type: none"> • Mourners refreshments 			
<ul style="list-style-type: none"> • Obituary notices 			
<ul style="list-style-type: none"> • Unpaid bills 			
<ul style="list-style-type: none"> • Utility bills 			
<ul style="list-style-type: none"> • Credit cards and statements 			
<ul style="list-style-type: none"> • Service charges and ground rents 			

Tax Returns and Other Tax Details

Document Information	Enclosed	To Follow	N/A
<ul style="list-style-type: none"> • National Insurance (NI) number Please provide the deceased's NI number below NI Number: _____			



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