

To make sure that there are as few complications as possible in the notification process, it's important to gather as much of the following information as you can about the person who has died:

- ☐ Full name
- ☐ Address
- ☐ Date and place of birth and death
- ☐ Date of marriage or civil partnership
- ☐ Recent occupation
- ☐ National Insurance number
- ☐ NHS number
- ☐ Tax reference number
- ☐ Passport details
- ☐ Driving licence details

We've created these checklists to simplify matters for you

Tick when done ☒

There are other matters that you may need to deal with, for example:

Legal:

- ☐ Retrieve a medical certificate from the hospital or GP practice
- ☐ Register the death if necessary, obtain copies of the death certificate
- ☐ Inform a solicitor and/or an accountant if you wish to obtain their support

Financial:

You may need to identify and deal with the deceased's:

- | | |
|--|--|
| <input type="checkbox"/> Bank, building society and other savings accounts | <input type="checkbox"/> Insurance policies – house, car, medical, etc. |
| <input type="checkbox"/> Credit cards | <input type="checkbox"/> Any ongoing rentals or loans |
| <input type="checkbox"/> Phone contracts | <input type="checkbox"/> Subscription services (e.g., Amazon Prime, newspapers or Netflix) |
| <input type="checkbox"/> Pension and life insurance | |

Contacting these organisations will also enable you to obtain relevant information about the deceased estate.