

**When someone we loved has died it feels like the world has stood still. Unfortunately, just at the time you are grieving for your loved one, there is lots to sort. Probate Solicitors Limited has written this leaflet to help you get through the necessary paperwork and to help you identify the information you require when dealing with a death. We hope you find it useful.**

## Collect personal information

You will need to collect personal information about the deceased as you are likely to be asked for references at a later stage. You will need:

- National Insurance number
- Date and place of birth
- Date and place of marriage/civil partnership
- NHS number
- Tax reference

## First things first

As soon as possible and within the first 5 days you should do the following:

- Notify the deceased's GP
- Find their will if they left one and contact the executor
- Register the death & obtain official copies of the death certificate. You will need sufficient copies to send to various authorities
- When you attend to register the death you can use the "Tell us once" service. This lets you notify pensions, benefits, DVLA, passport office etc.

- Arrange the funeral (taking into account any instructions in the will)

## Arranging probate

- If there is no will seek advice as to who can administer the estate

There are various alternative ways to apply for probate and administer an estate:

## Using a Solicitor



The majority of people use a solicitor to apply for probate and administer an estate. The executor or the nearest relative can instruct a solicitor and the legal costs can be paid from the estate. These legal costs are a legitimate expense and any executor or administrator is able to do this.

As property values increase it is important to claim all of the available allowances so that any Inheritance Tax is minimised. The addition of the Residence Nil Rate band in April 2017 has added another level of complexity to administering an estate.

Specialist solicitors are used to dealing with deceased estates and have relevant

knowledge of the law and the tax implications.

### Do it Yourself

You can obtain a grant of probate and deal with the administration of an estate in person. However, the person dealing with the estate will be personally liable for their actions/inactions. This is why most people choose a solicitor, who has proper insurance, for peace of mind.

### Other people and organisations to contact



#### Social/Personal contacts:

- Relatives
- Friends
- Any clubs they were a member of
- Church
- Employer
- Solicitor
- Accountant
- Dentist
- Local Newspaper if you would like to put an announcement in

#### Local Authority and Government contacts:

- School/college
- Tax office
- Local authority if they paid council tax/received social services help
- Benefits offices eg: tax credit, child benefit
- Passport service (return passport)
- DVLA (return driving licence)
- DWP (stop state pension)

#### Financial contacts:

- Banks / building societies

- Insurance companies
- Any companies which the deceased had hire purchase, loan or rental agreements with
- Pension providers
- Mortgage provider
- Credit card companies
- Any debtors who owed money to the deceased
- Any creditors to whom the deceased owed money

#### Household and Utility contacts:

- Gas and electric companies
- Landlord if property is rented
- Royal mail to re-direct post
- TV subscription companies eg: SKY
- Broadband provider
- Any agency providing home help

### What information will a solicitor need?

If you choose to use a solicitor to administer the estate you will need to take them:

- Death certificate & copies
- Financial information including, savings, assets, investments and debts
- Any recent household bills
- Title deeds to property or mortgage information
- Will or, if no Will, a rough family tree
- Birth certificate
- Marriage certificate
- National Insurance number

**Contact us:**  
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This leaflet is intended as guideline information, not legal advice. You should always seek legal advice from a specialist solicitor before taking any action.

