



WHAT TO DO WHEN A LOVED ONE DIES



There are a number of things to be done following the death of a relative or friend and many of them are straight-forward administrative tasks but they are all important



Register the death at your local Registry Office.

You will need the Deceased's:-

- Date of Birth
- Place of Birth
- Full name and address
- Any other or prior names/maiden name
- Most recent occupation



Locate the original of the latest will. Their home or local solicitors are most likely to have this.



Contact the funeral directors who will be handling the funeral. The will might direct which funeral director to use or a funeral policy the Deceased had in place may do so as well. Failing that, you can choose who to instruct.



Inform all the Government departments using the online 'Tell us Once' service. You will need the Deceased's:-

- Driving licence
- Passport
- National Insurance Number
- Car Number Plate
- Details of any benefits they received
- Local council services they benefitted from (such as blue badge holder)
- Details of any surviving spouse and/or the next of kin



Notify all asset holders of the death and obtain date of death asset valuations. You will need the death certificate to do this and this is most easily done by visiting offices or branches of the institutions.



Notify any creditors and obtain date of death liability valuations. You will need the death certificate for this and it may be hard to locate everyone who is owed money – checking through all the paperwork at the Deceased's house is the best place to start.



Prepare the Inheritance Tax return and pay any tax due. The type of form you need to fill in differs if you do or do not have to pay tax. It is highly advised to seek a solicitor's help for this part because if you calculate the tax wrong, then you as the executor/administrator will be **personally liable** to ensure the tax is paid.



Prepare the grant of probate or letters of administration application. This is completed using a form PA1P or PA1A and both can be obtained from the government's website.



Submit the application to your local Registry Office. Note there is an application fee for submitting this application and the amount you pay differs from estate to estate – check the government website for the latest figure.



Once the grant or letters are issued, gather in the assets and settle any liabilities. You will need to send an original copy of the grant out to each institution so make sure you order enough grants to cover this (they will be returned to you by the addressee however).



Distribute according to the wishes and directions of the will and any codicil. Be especially careful not to distribute anything if:-

- There is a creditor who has not been paid or you do not know how much they are owed
- If there is a legal challenge to the will and court proceedings have begun
- You have not yet confirmed that you have found every beneficiary - sometimes people lose touch and move away and it can be hard to track them down but you must do so before paying anything out



Finalise the estate by double-checking all assets and liabilities are accounted for.

If you have difficulty with any stage of this process then our team of specialist probate professionals are always here to help.

Please call us on 01582 514000

Machins Solicitors LLP have offices in Berkhamsted and Luton. We are one of the leading law firms in Hertfordshire and Bedfordshire and recognise the need to establish a proper relationship with our clients which allows us to understand individual requirements and to give effective practical advice in a pragmatic, cost effective way. We provide specialist advice and assistance both for businesses and individuals.