When you attend your first appointment, it is likely that the solicitor will ask you for the following and so it would be useful if you could bring the same with you if possible:

Documents

1. Original Will (unless stored at our offices)
2. Original Death Certificate – we may need more than one original so you should ask the registrar for at least 5 copies when you register the death
3. Property Deeds (if applicable)
4. Funeral invoice (if available)
5. ID for each Executor of the Will – we will need two forms including either a valid passport or driving licence AND a bank statement or utility bill showing your name and address which must be less than 3 months old.

Information

1. Names, Addresses and Dates of Birth of Beneficiaries (if there is a Will)
2. Family Tree together with Names, Addresses and Dates of Birth of family members (if there is no Will)
3. National Insurance Number – you will find this on any correspondence from DWP
4. Tax District & Tax Reference Number - you will find this on any correspondence from HMRC
5. Accountants name and address (if the deceased had an accountant)

Financial Paperwork

We need to know who to contact to inform of the death and obtain valuations from. Please bring with you one item of paperwork in the form of either a statement or tax voucher etc relating to each asset / income of the deceased. The paperwork should show the name of the company and any account numbers or references that will identify the holding. Examples of the type of assets / income that people have are:

1. Stocks and Shares
2. Premium Bonds
3. National Savings Certificates
4. Life policies
5. Company pension
6. Annuity
7. Business assets
8. Credit Cards/Loans
9. Bank / Building Society Accounts
10. Investments

*If there are any assets in joint names please bring details of these too.