

## **Administration of Estates**

### **Initial Steps**

Soon after a death there are a number of practicalities that need to be dealt with. In the vast majority of cases starting the administration of an estate is a new, and often daunting experience. The following list is intended to help you through the initial steps. Not all of these will be relevant in all cases.

#### ***Register the death***

You will need to obtain the certificate of the fact of death from a doctor and take it to the Registry of Births, Marriages and Deaths in order to obtain a death certificate. You will also be given a form of Registration of Death for the purposes of the Benefits Agency and a green form, known as a Certificate for Burial or Cremation, which the undertakers will require. Your solicitor will require at least one copy of the death certificate and the form of Registration of Death.

#### ***Arrange Funeral***

You should ensure that any particular wishes contained in the Will are complied with. You may consider putting death notices in the paper, but beware of alerting criminals if the property is empty. You will need to inform family and friends of the date and venue of the funeral.

#### ***Other Practical Steps***

- Place valuables in safe keeping
- Make sure that the property is secure. Consider changing locks
- Make sure keys are held by the appropriate people
- Inform Police that the property is vacant
- Organise for the property to be visited regularly
- Redirect mail
- Arrange for hired television and other appliances to be returned

#### ***Consider...***

- Disconnecting main services at the property and draining the water system
- Notifying the Department of Vehicle Licensing Centre in Swansea and the car insurers. If appropriate arrange insurance for new driver

#### ***Arrange appointment with Hart Brown***

Remember to bring any papers, files and deeds that you think will be relevant to the administration. These may include:

- The Will and any documents kept with it
- The death certificate/Certificate of Registration
- Income Tax papers
- Share certificates
- Property title deeds
- Bank details, cheque books and bank statements etc.

- Credit cards
- Building Society passbooks
- National Savings Certificates or information relating to any such savings products
- Insurance policy documents
- Unpaid bills
- Gas, electricity and telephone accounts
- Pension/allowance books
- Rent book

This list is not exhaustive but gives an indication of the documents that will help us to start the administration of the estate. We will also need:

Details of the deceased's:

- Accountant
  - Tax office
  - National Insurance number
  - Stockbroker
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- Addresses and ages of individuals named in the Will
  - Details of anyone who was financially dependant on the deceased
  - Information required for Inheritance, Capital gains and Income Tax purposes (see factsheet "Tax – briefly!")