PRIVATE CLIENT GUIDE

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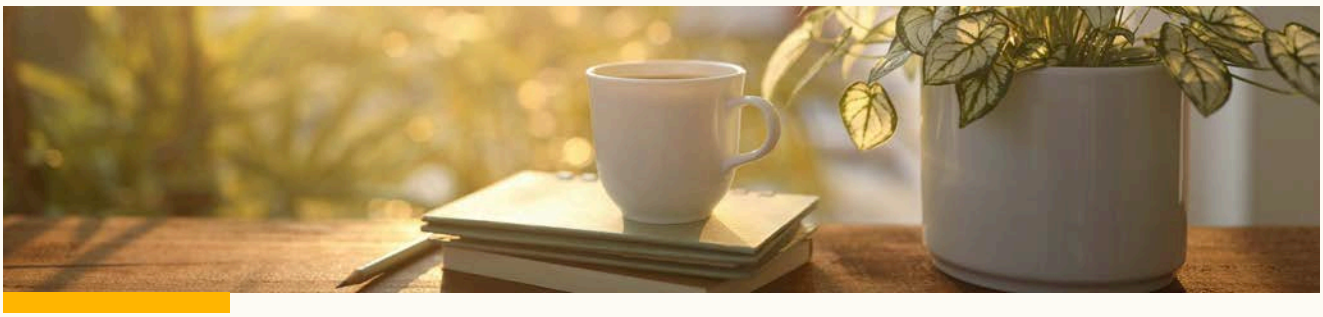
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WHAT TO DO WHEN SOMEONE DIES

A practical guide to the first steps

Losing someone close to you is difficult, and the days that follow can feel overwhelming. Alongside the emotional impact, there are often practical matters that need attention, some of which may be unfamiliar.





A short word before you begin

Losing someone close to you is difficult, and the days that follow can feel overwhelming. Alongside the emotional impact, there are often practical matters that need attention, some of which may be unfamiliar.

This guide explains what usually needs to be dealt with after a death, what can wait, and when it may be helpful to seek professional probate support. It is designed to give reassurance and clarity, not to rush you or add pressure at an already hard time. Not everything has to happen at once.

What usually needs to be dealt with first

In the days following a death, the focus is typically on a small number of practical steps.

Registering the death

The death normally needs to be registered within a short time. This is usually handled by a close family member or someone present at the death. The registrar will explain what documents are needed and will issue copies of the death certificate.

It is sensible to ask for several certified copies, as organisations such as banks and pension providers often require them.

Arranging the funeral

The funeral is usually arranged by the executor named in the Will (or the administrator where there is no Will), although family members often take the lead in practice. Any wishes expressed by the deceased should be taken into account, though they are not legally binding. Families often choose different approaches.

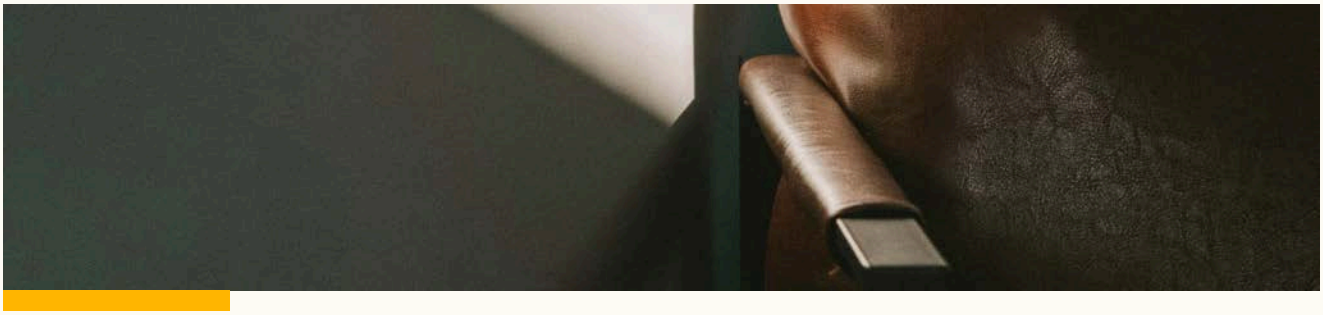
Telling close family, friends and employers

Informing those close to the deceased is usually a priority. Anyone who is bereaved may also wish to notify their employer, as compassionate or bereavement leave may be available to help with funeral arrangements and other practical matters.

TAKE THINGS ONE STEP AT A TIME. NOT EVERYTHING NEEDS TO BE DEALT WITH IMMEDIATELY

REGISTERING THE DEATH AND ARRANGING THE FUNERAL ARE USUALLY THE FIRST PRACTICAL PRIORITIES

KEEP SEVERAL CERTIFIED COPIES OF THE DEATH CERTIFICATE



Finding the Will (if there is one)

If the deceased made a Will, it is helpful to locate it sooner rather than later.

Wills are often:

- Kept at home with personal papers
- Stored with the law firm that prepared it, or
- Registered with a Will storage service

At this stage, the key points to check are:

- Who is named as executor
- Whether any funeral wishes are recorded

Only the executors are entitled to deal with the estate, although their powers may be limited at this stage.

If there is no Will, the estate is dealt with under legal rules known as the intestacy rules. A probate practitioner can explain how these apply.

Looking after property, pets and belongings

If the deceased owned or rented a home, it is sensible to ensure it is secure. Insurance providers should be informed of the death and steps taken to ensure cover remains in place.

Practical points often include:

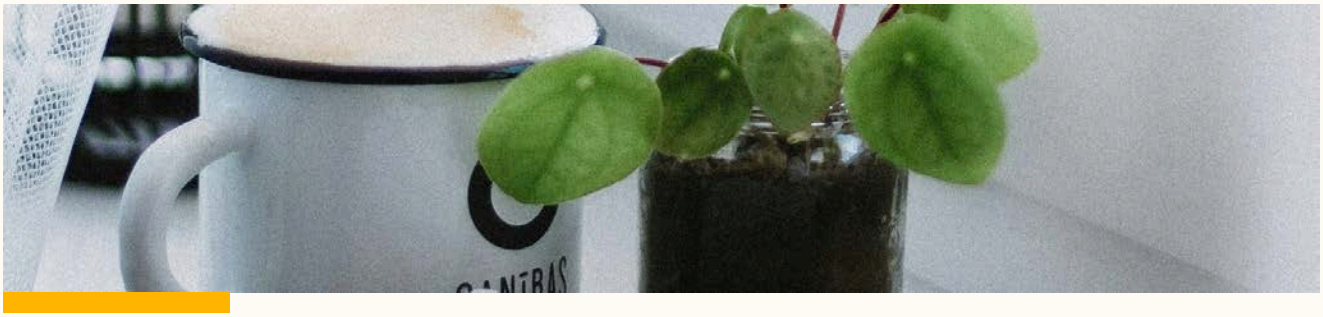
- Securing valuables
- Making arrangements for pets
- Redirecting post if appropriate
- Identifying any vehicles owned by the deceased and ensuring that the DVLA and motor insurers are notified where necessary
- Checking that appropriate insurance remains in place before any vehicle is used

These steps help protect the estate while longer-term decisions are considered.

LOCATE THE WILL IF ONE EXISTS

SECURE PROPERTY, VALUABLES AND PETS

NOTIFY INSURERS AND RELEVANT ORGANISATIONS PROMPTLY



What does not need to be rushed

Many people worry that legal and financial matters must be dealt with immediately. In most cases, this is not so. In particular:

- The probate process does not usually need to begin straight away
- Gathering valuations and paperwork takes time
- Professional advice is often most useful once immediate arrangements are complete

Taking some time before focusing on administration is entirely normal.

When professional probate support becomes helpful

After the initial period, attention usually turns to dealing with the estate, the process commonly referred to as probate. Probate involves:

- Identifying assets and liabilities
- Reporting values to HMRC where necessary
- Applying for the legal authority to deal with the estate
- Collecting and distributing assets

Many people choose to work with a probate practitioner to manage some or all of this process, particularly where matters feel complex or emotionally difficult.

What happens next

Our companion guide, *Understanding probate: a plain-English overview*, explains how probate works in practice and what you can expect. If you would like to talk through your circumstances or understand what support might be helpful, our probate team is available to help when you are ready.

TALK TO AN EXPERT



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