A GUIDE FROM YOUR LEGACY SOLUTIONS

What to do when a loved one dies.

When someone close to you dies, it can be difficult to know what to do first, and in what order — especially at the moment you have the least energy for it. This guide walks through the first steps in plain English, from registering a death through to administering the estate.

01 Register the death

02 Tell government departments

03 Find the Will & important papers

04 Arrange the funeral

05 Apply for Probate

06 Gather important papers

07 Settle the estate

01 · REGISTERING THE DEATH

Registering the death.

This has to happen before you can make any funeral arrangements. Register at the Register Office for the area where the person died — within 5 days in England and Wales, or 8 days in Scotland. Take the medical certificate, birth and marriage certificates, and an NHS medical card if you have one. Buy several copies of the death certificate — you'll need one for each bank, pension and insurer.

02 · TELL US ONCE

Telling government departments.

The government's free "Tell Us Once" service reports a death to most government departments in one go — HMRC, the DWP, passport office, DVLA, and local council — so you don't contact each separately. The registrar gives you a reference number when you register the death, or visit gov.uk/after-a-death.

03 · THE WILL

Dealing with the Will.

Find a valid Will — it usually sets out funeral wishes and determines how the estate is administered. If we've written the Will, or you're unsure where it might be, give us a call.

04 · CANCELLING A POWER OF ATTORNEY

If there was a Lasting Power of Attorney.

If the person had made an LPA, it ends on death and must be cancelled with the Office of the Public Guardian (OPG). A simplified process lets attorneys notify the OPG using an online form and a copy of the death certificate.

05 · APPLYING FOR PROBATE

Understanding Probate.

Probate gives you legal authority to access the deceased's assets and administer their estate. You'll apply using the Will (if there is one), the death certificate, and details of all assets and liabilities. The process typically takes 15 weeks once all the paperwork has been submitted, but can be longer if the estate is complex or disputed.

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06 · IMPORTANT PAPERS

Gathering important papers.

You'll need: birth, marriage and death certificates; the Will and any codicils; details of all bank accounts, savings, investments, and property; insurance policies; pension paperwork; mortgage and loan details; and tax records.

Missing documents can slow the process. Some institutions will provide copies if originals are lost.

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07 · SETTLING THE ESTATE

Administering the estate.

Once you have Probate, you can: close accounts and pay debts, deal with shares and investments, redirect post, handle property and assets, calculate and pay Inheritance Tax and Income Tax, and distribute what remains to beneficiaries.

"I'm named Executor, so I can just get on with it myself." You can — but you're personally liable for mistakes in the tax and legal paperwork. Many Executors choose specialist support for this reason.

PROBATE & ESTATE ADMINISTRATION

Expert support through probate and estate administration.

Probate can be the most complex and time-consuming step after a death. You'll need to gather all assets, pay debts and taxes, and distribute what's left — often while managing grief and other responsibilities. A mistake in the legal or tax paperwork can be costly.

We guide you through every stage: applying for a Grant of Probate, identifying all assets and liabilities, managing the timeline, and ensuring everything is correct. Fixed fees, agreed up front. No jargon.

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