



PROBATE CHECKLIST

What to do when someone dies



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A simple checklist

When someone dies, trying to sort out what needs to be done can seem overwhelming. Besides letting family and friends know, we detail below a list of other organisations which may need to be notified.

You should notify the following of death:

- Banks
- GP, dentist, optician
- Local council regarding council tax
- Electricity supplier
- Gas supplier
- Water company
- Independent Financial Advisors
- Broker
- Mortgage provider
- House insurers (building & contents might be separate)
- Landline telephone supplier
- Mobile provider
- Broadband supplier
- TV licensing and any digital TV providers (e.g. Sky / Virgin Media)
- Life insurance companies
- Gardener (and check if key holder)
- Cleaner (and check if key holder)
- Newsagent if newspapers are delivered
- Milkman
- Credit card companies

NB: This list is not exhaustive



In addition to formally notifying all relevant organisations we also list a number of other practical things which should be considered.

Other things to consider:

- Contacting the governments **“Tell us Once”** service
- Is the house secure, for instance who has keys/are alarms set
- Has contact been made with third parties in respect of HP, lease equipment
- Is there any high value electronic equipment in the house
- Is there any high value jewellery
- Are there any pets that require care
- Are there any motor vehicles and are they secure
- Have we considered Road tax and/or SORN (statutory off-road notification) for any vehicles
- Did the deceased own any Firearms. If so has the police licensing department been contacted
- Are there any safety deposit boxes
- Consider whether you need to notify any charities, organisations or magazine subscriptions that the deceased made regular payments to
- If the deceased was a landlord should their tenant be notified

We understand when someone dies there is a lot to cope with, we have a dedicated team of probate specialists at Bishop Fleming who can help support you through the process. If you need any assistance please contact **Olivia Down** who will be able to provide you with as much help and support as required.

Olivia Down
Tax Director

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Meet our team



Alex Robins

Tax Partner

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Alex advises an extensive portfolio of privately owned businesses guiding them through the opportunities and pitfalls that can affect their business and private lives.

Alex obtained the ICAEW probate qualification shortly after it was launched. He creatively finds solutions to tax issues that fit his clients plans and is able to convey technical issues in clear and easy to understand explanations



Alison Oliver

Audit Partner

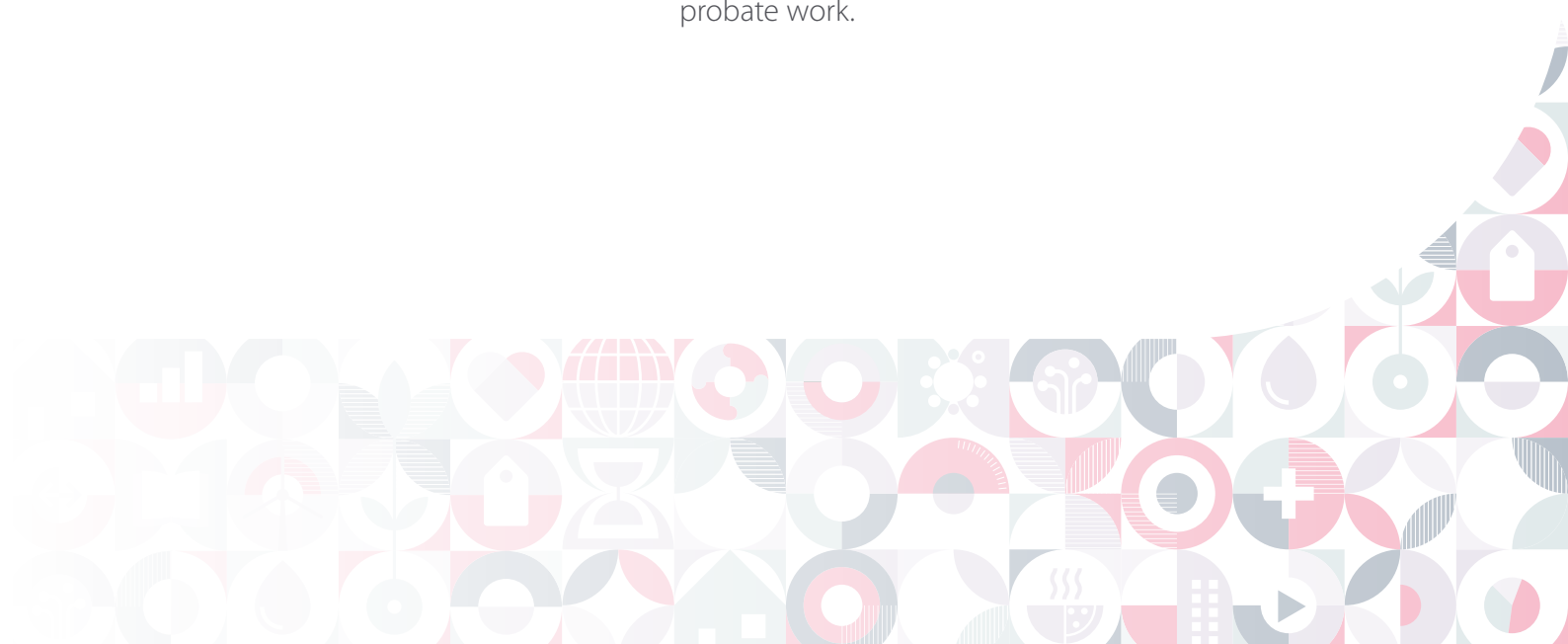
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Alison is an experienced audit and general practice partner, advising and supporting a wide range of owner-managed and not-for-profit organisations.

Alison obtained the ICAEW probate qualification shortly after it was launched and was instrumental in the firm becoming licensed to undertake probate work.



Meet our team



Olivia Down

Tax Director

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Olivia prides herself on the ability to translate complex scenarios into clear and simple advice which is appreciated by her clients. Being part of both the Wealth Management and Probate teams, Olivia strives to be the trusted advisor to her clients.



Rebecca Hawkins

Senior Tax Manager

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Rebecca is a Chartered Accountant and Chartered Tax Advisor experienced in personal tax matters, wealth management and probate services.

As a Manager within the firm's personal tax team with over 10 years' of experience, Rebecca can provide guidance and support to individuals, families and trusts. She can explain often complex matters clearly and concisely.



To find out how we can help you or your business, contact us:

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