What to do immediately after someone has died

We are sometimes asked by clients what they have to do immediately after a relative dies. This page contains the most important matters a relative has to deal with first:

1. Collect the medical certificate from the doctor.

2. Take the medical certificate to the Registrar of Births, Deaths & Marriages, in order to register the death. It will also help to take the deceased's birth certificate with you.

3. The Registrar will give you 3 forms:

a) the full Death Certificate - which you keep
b) a green Certificate of registration of Death - for the funeral director
c) a white Certificate of Registration of Death - for the DSS

4. If the deceased person left a Will, telephone the solicitors holding the Will to see if there are any instructions in the Will regarding that person's wishes for their funeral. Please note that solicitors are not allowed to release any other information contained in the Will until they have seen the Death Certificate.

5. Contact the funeral directors and give them the green Certificate of Registration of Death. If the deceased is to be buried in a previously purchased or joint grave, it will help to take the grave deed with you.

6. With regard to the legal aspects of the estate, unless there is any urgency, you do not need to see us immediately. We suggest that you wait until after the funeral before telephoning us to arrange an appointment.

7. You will need to bring the following information with you to your appointment with us.

- Proof of identity (passport and utility bills) for anti-money laundering purposes
- The death certificate, the Will (if we do not hold it), all papers related to the financial affairs, and the deeds of any property (if we are not holding them)
- The names and addresses of the next of kin if there is no Will, or the addresses of all the people mentioned in a Will.

8. We will then be able to give you initial advice and discuss the next steps in sorting out the deceased’s financial affairs.

If you have any other queries before you see us for an appointment, please contact Jenny Pierce, who is head of our Tax and trusts team, on 0117 929 2811, email jenny.pierce@wards.uk.com. She will either help you herself, or put you in touch with a team member at an office local to you.