

What to Do When There Is No Will

A practical document-finding checklist when you don't know where to start.

This is about finding the information you will need if you have to deal with probate, solicitors or pension providers.

Basic Information

- ☐ Full legal name
- ☐ Date of birth
- ☐ Date of death
- ☐ National Insurance number
- ☐ Last address
- ☐ Previous addresses that may be relevant
- ☐ Occupation / employer

Other names previously used

Family Information

You may be asked for family information as the estate is dealt with. I had to fill in forms in regards to Darren's pensions that had to include nephews and nieces, as well as first cousins.

- ☐ Spouse or civil partner details
 - ☐ Children
 - ☐ Parents
 - ☐ Brothers and sisters
 - ☐ Other family details I have been asked to provide
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The House and Other Property

- ☐ Whose name is the home in?
- ☐ Title deeds / Land Registry information
- ☐ Mortgage details, if any
- ☐ Rates information
- ☐ Any other property, land or property interest
- ☐ Home insurance documents

What / provider	Account / reference	Where I found it	Found
			☐
			☐
			☐
			☐
			☐

Banks, Savings and Investments

Don't worry if you don't know every account. Start with what you know and add things as you find them.

- ☐ Current accounts
- ☐ Savings accounts
- ☐ Building society accounts
- ☐ ISAs
- ☐ Premium Bonds / National Savings
- ☐ Investments / shares
- ☐ Credit union accounts
- ☐ Other savings or investments

What / provider	Account / reference	Where I found it	Found
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Pensions and Employment Benefits

- ☐ Current workplace pension
- ☐ Pensions from previous employers
- ☐ Private / personal pensions
- ☐ State Pension information, where relevant
- ☐ Death-in-service benefit
- ☐ Final salary / holiday pay / money owed by employer
- ☐ Other workplace benefits

What / provider	Account / reference	Where I found it	Found
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Insurance

- ☐ Life insurance
- ☐ Mortgage protection
- ☐ Workplace life cover
- ☐ Home insurance
- ☐ Car insurance
- ☐ Other insurance policies

What / provider	Account / reference	Where I found it	Found
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Debts and Money Owed

Finding a debt does not mean you personally owe it. Record it and get advice where needed.

- ☐ Mortgage
- ☐ Loans
- ☐ Credit cards
- ☐ Car finance
- ☐ Overdrafts
- ☐ Buy-now-pay-later / finance agreements
- ☐ Tax or other liabilities
- ☐ Money owed to somebody else

What / provider	Account / reference	Where I found it	Found
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Important Documents

- ☐ Death certificate / registration documents when available
- ☐ Birth certificate
- ☐ Marriage / civil partnership certificate
- ☐ Property documents
- ☐ Bank statements
- ☐ Pension letters
- ☐ Insurance policies
- ☐ Employment paperwork
- ☐ Tax paperwork
- ☐ Vehicle documents

Where I am keeping all the paperwork

People I May Need to Speak To

- ☐ Solicitor
- ☐ Employer / HR
- ☐ Pension provider
- ☐ Insurance provider
- ☐ Bank / building society
- ☐ Accountant
- ☐ Financial adviser
- ☐ Other professional

What / provider	Account / reference	Where I found it	Found
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			☐
			☐
			☐
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Things I Haven't a Clue About Yet

What Do I Need to Find Next?

1.

2.

3.

4.

5.

Things I Can Leave Until Later

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

About this resource: This worksheet is based partly on my own experience after Darren died without a will. It is designed to help you gather information and documents; it is not legal, probate or financial advice. The rules about estates and intestacy depend on where you live and your circumstances.