

## Letting Organisations Know – Useful Checklist

The Surrey Registrars will have registered you for the **Tell Us Once** service at your appointment if the deceased's usual address was in a participating area. Completion of the second part of Tell Us Once following your registration will enable you to notify some of the departments and organisations listed below – if you use Tell Us Once, you will not need to contact them again.

Whilst the following information is not exhaustive, we have listed the usual organisations that need to be informed following a death and we hope that it will help you over the next few days and weeks.

It is very useful to have information about the person that has died available when contacting any company or association. This will make the task of answering questions or completing any forms much easier.

Details of the deceased that will be most useful to know include:

- Full name of the deceased (including any previous names)
- Date and place of birth
- Date and place of death
- Last address of deceased (including postcode)
- Spouse's full name, date of birth and occupation (if applicable)
- Date of marriage or civil partnership (if applicable)
- National Insurance Number
- NHS Number
- Child Benefit Number (if applicable)
- Tax Reference Number (if applicable)

We have separated the list into categories to try to assist you.

### **Pensions/social security benefits/new tax credits:**

- Contact the **Department of Work and Pensions** to ensure any state pension payments are stopped.
- Contact the deceased's employer or current occupational pension provider as they will advise if the deceased's occupational pension can be passed to another family member or surviving civil partner.
- Contact the deceased's personal pension provider, if a policy was in place.
- Contact a **Jobcentre Plus** or Social Security Office if benefit was in payment, for example, Income Support, Pension Credit, Jobseekers Allowance, Housing Benefit, Child Benefit, Attendance Allowance.
- Contact **Her Majesty's Revenue and Customs**, if tax credits were in payment (Working Tax or Child Tax Credits).

### **Health services:**

- Tell the deceased's doctor and any other health service provider they may have used, such as local hospital, dentist and chiropodist.
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- Return any equipment the deceased may have borrowed from a hospital, clinic or Social Services.
- Inform any company providing health and life insurance.
- **Cancel** any services received from Social Services, such as meals-on-wheels, transport or home help.

### **Financial Organisations:**

- Tell the **Inland Revenue** as there may be an income tax refund due.
- Contact Banks, Building Societies, credit card companies, insurers, Post Office savings, premium bonds, stocks and shares.
- Contact the **HM Revenue and Customs** who will give you advice and information on all tax matters relating to an estate.
- Inform any companies concerning rental, hire purchase or loan agreements.

### **Houses and household bills:**

- Ask the **Post Office** to redirect the deceased's mail or you can register yourself online.
- Use the online facility to register with the **Bereavement Register** to stop unwanted junk mail or direct mailings arriving at the deceased's home address.
- Whilst the law states that the Registrar who registers the death must tell the Council Tax Department of a person's death, you may wish to contact them directly to discuss any outstanding monies owed, refunds or reductions in Council Tax Charges.
- Depending on the deceased's circumstances, you may need to speak to a council housing department, housing association, mortgage company or private landlord.
- Tell the deceased's gas, electric, water and telephone provider.
- Cancel any subscriptions with TV, satellite and internet provider.
- Cancel any deliveries of heating oil.
- Inform the insurance company that provides the household insurance.

### **Other local borough and county council services:**

- Inform the electoral services at the relevant **borough council**.
  - Inform Adult Social Care if the deceased was receiving any services, for example a personal care package. **Surrey Adult Social Care** can be contacted on 0300 200 1005.
  - Inform Children's Social Care if the deceased was receiving any services. **Surrey Children's Social Care** can be contacted on 0300 200 1006.
  - Return any library books and cancel membership – **Surrey Libraries** can be contacted on 0300 200 1001.
  - Inform any departments where money may be owed for services provided, for example, allotment fees, assisted bin collection, school meals, tuition lessons etc.
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### Transport and Travel:

- Tell the car insurance company. Please note that anyone who is a named driver on the deceased's car insurance will no longer be insured to drive the vehicle. This is because the person who took out the insurance is not alive to give permission for someone else to drive.
- Notify any company providing travel insurance.
- Return the deceased's driving licence to the **Driver & Vehicle Licensing Agency (DVLA)**.
- Return the deceased's car registration documents to the **DVLA** to allow the change of ownership to be recorded.
- Cancel or return any travel passes or season tickets. Claim any refunds due.
- Return the deceased's passport to the **HM Passport Service** – please cut off the top right hand corner of the passport's front cover to invalidate it. You need to complete an additional form when returning the document which they will provide for you.
- Return any disabled parking permit to the **Surrey County Council Blue Badge Team**, located at County Hall in Kingston, quoting the date of death and your relationship to the person. If you wish to keep the photo of the badgeholder you may cut it out and keep it.

### Personal Considerations:

- Send back any membership cards to clubs or associations and claim any refunds that may be due.
  - Inform the deceased's church or place of worship.
  - Inform any social groups to which the deceased belong.
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