

# Bereavement Checklist

**We have provided this easy to use step by step checklist to try and make things as simple as possible during this difficult time.**

We appreciate that not everyone has had to go through this process before and as such this list, whilst not exhaustive, should cover most of the areas that you will need to consider following the death of a loved one.

## **Registering of a death**

In England and Wales, you normally need to register the death within five days. It's best to go to the registrars office in the area where the person died, otherwise it may take longer to get the documents you need and this could delay the funeral. It will take about half an hour to register the death. You usually need to make an appointment beforehand.

## **Procedure**

- Contact the doctor (GP) or hospital about obtaining the Medical Certificate of Cause of Death, or contact the coroner's officer to find out when the relevant certificate will be ready.
- Call your Heart of England Co-op funeral home, who will make arrangements to bring the person into our care, if they have died at home.
- Telephone the Registrar of Births, Deaths and Marriages to make an appointment to register the death.
- Complete the Notification or Registration of Death (BD8) form that you were given by the Registrar. This document will inform the Government departments of the death, but it is also advisable to contact relevant Government departments directly (such as pensions, benefits and the tax office) to avoid any accidental overpayments.
- Start to make the funeral arrangements with your Heart of England Co-op funeral director who will guide you through what need to happen next and advise you on the type of decisions you will need to make.

**If the person died in a house or hospital, the death can be registered by:**

- a relative
- someone present at the death
- an official from the hospital
- the person making the arrangements (not the funeral director)

**Deaths that occurred anywhere else can be registered by:**

- a relative
- someone present at the death
- the person who found the deceased
- the person in charge of the deceased
- the person making the arrangements (not the funeral director)

Most deaths are registered by a relative, the registrar would normally only allow other people to register if there are no relatives available.

**When registering a death, you'll need to take the following:**

- medical certificate of the cause of death (signed by a doctor)

**And, if available:**

- birth certificate
- marriage or civil partnership certificate
- NHS Medical Card
- Council Tax bill
- driving licence
- passport
- proof of address (eg utility bill)

**Information you will need to tell the registrar:**

- the person's full name at time of death
- any names previously used, including maiden surname
- the person's date and place of birth (town and county)
- their last address
- their occupation
- the full name, date of birth and occupation of a surviving spouse, late spouse or civil partner
- if they were getting a state pension or any other state benefit/s

**If a post-mortem is not being held, the registrar will give you:**

- a Certificate for Burial or Cremation (the 'green form') - gives permission for burial or an application for cremation to take place
- a Certificate of Registration of Death (form BD8) - you may need to fill this in and return it if the person was getting a State Pension or benefits (the form will come with a pre-paid envelope, so you know where to send it)
- you can buy extra death certificates - these will be needed for sorting out the person's affairs

**Tell us Once**

Tell Us Once is a service that lets you report a death to most government organisations in one go.

The Registrar will explain the Tell Us Once service when you register the death.

They will either:

- complete the Tell Us Once service with you
- give you a unique reference number so you can use the service yourself online or by phone

## Arranging the funeral

- Contact your funeral director to discuss your requirements and arrange an appointment to make the funeral arrangements, this could be at the funeral home or your location of choice.
- Check to see if the deceased had a Pre-paid Funeral Plan – as this will have much of the funeral arrangements detailed including the financial aspect.
- Check to see if there is a Will, again this may contain information about specific requests for the funeral.

## Dealing with the estate

- Locate the Will (it may be at the deceased's property or lodged with their solicitor).
- If there is no Will, decide who will deal with the deceased's estate as they will need to contact the Probate Registry and apply for Letters of Administration.
- Find out if probate is needed, if it is obtain the Will and inform the executors.
- Gather any documents relating to financial affairs and property ownership.
- The executor or administrator will decide how to go about the probate process.
- Surviving relatives and friends of the deceased may need to make a new Will so obtain legal advice.

## Benefits and financial help

- You may be able to claim certain benefits and / or one-off payments depending on your relationship to the deceased, time limits may apply so contact the Jobcentre Plus.
- Check your current benefits and tax credits.
- Certain employers, charitable organisations and clubs may be able to offer financial help.
- There may be additional advice or information available to help you from your funeral advisor.

# Who needs to be informed

Following the death of a family member there are some services and organisations that you may be required to inform. This list is not exhaustive, but hopefully it will be a helpful reminder.

## Financial

- Accountant
- Banks
- Building Societies
- Car Insurance
- Credit Card Providers
- Credit Union
- Investment/  
Share Companies
- Life Insurance Companies
- Loan Companies
- Mortgage Provider
- Private Pension Plan
- Revenue Authorities
- Social Welfare
- State Pension
- Store Cards
- Tax Office

## Health

- Dentist
- Doctor
- Optician
- Private Medical Insurance
- Therapists  
(eg. Chiropractor,  
Chiropodist)

## Household

- Council Tax
- Electricity
- Gas
- Heating Oil Suppliers
- Household Insurance
- Landlord
- Maintenance Contracts  
(eg. Alarm)
- Milk Delivery
- Newspapers
- TV and Internet Provider
- Water Supply

## Membership

- Gym
- Library
- Sports Clubs
- Social Clubs

## Subscriptions

- Charities
- Magazine Subscriptions
- Mail Order Companies
- Trade Union

## Other

- Driving Licence
- Education
- Employer
- Home Help
- Meals on Wheels
- Passport
- Social networking sites
- Solicitor
- Travel Agent Bookings
- Travel Pass for  
Bus/Rail etc

## Notes

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