

 VALOREN

THE FAMILY HANDOVER FILE

prepared for the household of

David James Pemberton

10 SEPTEMBER 2026



REF VAL-ONWALS

The people who love you should inherit answers, not questions.

8 pieces, in the order they sit in the pack — and the sheet each one is on.

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 The registers

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IF A PIECE IS MISSING

The digital copy holds the content of every numbered piece, ready to reprint — it arrived with this File by email, and a reply to that email reaches a person who can send any piece again.

Names and last digits only — nothing in this pack unlocks anything by itself.



Work down the list. Date each institution on the line as it is told — this page is designed to be **written on**. The Death Notification Service (free) covers most of the banks in one form.

Banking

DATE NOTIFIED

Nationwide	Joint current account	4471	_____
Barclays	Sole current account	•• 4488	_____

Pensions

Aegon	Pension / Workplace	AV5518	NOMINATION CHECKED _____
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Insurance

Zurich	Home or contents policy	ZH 2210	_____
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Property

Nationwide	Mortgage on the home — joint title	1188	_____
HM Land Registry	Joint owner — to take their name off the register, send form DJP to HM Land Registry with an official copy of the death certificate; no grant is needed for this step. Deeds: Registered title — no paper deeds; the official copy is in the grey file box.	—	_____

Names and last digits only — never full numbers, never passwords.

I

SECTION I

The Letters

One letter per institution, ready to sign — each with the reply card that proves it landed.

BEFORE YOU POST EACH ONE

- Sign it and date it.
- Write your own address on the reply card, so the acknowledgement comes back to you.
- Enclose the certified copy named on the letter.
- Fold it **once**, not twice — this paper is heavy and cracks on a tight crease. A C5 envelope takes a single-folded sheet.
- Write the date on the Register as it goes.

A letter sent is a date you can point to.



Bereavement Services
Specialist Customer Support
Nationwide Building Society
Swindon
SN38 3FN
10 September 2026

THE FACTS

FULL NAME
David James Pemberton

BORN
3 April 1949

DIED
9 August 2026

ADDRESS
14 Beechwood Avenue
Harrogate HG2 8QT

ACCOUNTS
Joint current account 4471

EXECUTOR
Andrew Pemberton

ENCLOSED
Certified death certificate — copy 03

Notification of the death of David James Pemberton

Dear Bereavement Services,

David James Pemberton, a customer of yours, died on 9 August 2026. I am their executor. Their details are set out on the right of this letter, and the lower card is yours to return. Please:

- 1 Register the death and freeze the sole accounts.
- 2 Leave the joint account operating for the surviving holder.
- 3 Confirm the balances at the date of death, in writing.
- 4 Complete and return the acknowledgement card below — the return address is printed on it.

Yours faithfully,

ANDREW PEMBERTON · EXECUTOR

DATE

PLEASE REPLY TO
Andrew Pemberton
3 Mill Lane
York YO1 7HT

✂ ----- DETACH · THE BANK KEEPS THE LETTER, RETURNS THIS -----

ACKNOWLEDGEMENT · RETURN THIS CARD

N-01

We confirm the death of **David James Pemberton** is registered against their accounts and date-of-death balances will follow in writing.

ACTIONS BY

BRANCH / TEAM

DATE

Return to: Andrew Pemberton, 3 Mill Lane, York YO1 7HT



Bereavement Service Centre
Barclays Bank PLC
Leicester
LE87 2BB
10 September 2026

Notification of the death of David James Pemberton

Dear Bereavement Service Centre,

David James Pemberton, a customer of yours, died on 9 August 2026. I am their executor. Their details are set out on the right of this letter, and the lower card is yours to return. Please:

- 1 Register the death and freeze the sole accounts.
- 2 Confirm what documentation you require before the accounts can be closed.
- 3 Confirm the balances at the date of death, in writing.
- 4 Complete and return the acknowledgement card below — the return address is printed on it.

Yours faithfully,

ANDREW PEMBERTON · EXECUTOR

DATE

PLEASE REPLY TO
Andrew Pemberton
3 Mill Lane
York YO1 7HT

THE FACTS

FULL NAME
David James Pemberton

BORN
3 April 1949

DIED
9 August 2026

ADDRESS
14 Beechwood Avenue
Harrogate HG2 8QT

ACCOUNTS
Sole current account •• 4488

EXECUTOR
Andrew Pemberton

ENCLOSED
Certified death certificate — copy 04

✂ ----- DETACH · THE BANK KEEPS THE LETTER, RETURNS THIS -----

ACKNOWLEDGEMENT · RETURN THIS CARD

B-02

We confirm the death of **David James Pemberton** is registered against their accounts and date-of-death balances will follow in writing.

ACTIONED BY

BRANCH / TEAM

DATE

Return to: Andrew Pemberton, 3 Mill Lane, York YO1 7HT



Bereavement Team
Aegon and Scottish Equitable Pension and Bonds
Sunderland
SR43 4DS
10 September 2026

Notification of the death of David James Pemberton

Dear Bereavement Team,

David James Pemberton, a customer of yours, died on 9 August 2026. I am their executor. Their details are set out on the right of this letter, and the lower card is yours to return. Please:

- 1 Register the death against the pension and stop any future payments.
- 2 Confirm whether any death benefit or dependant's pension is payable, and to whom.
- 3 Confirm the position at the date of death in writing, for the estate.
- 4 Complete and return the acknowledgement card below — the return address is printed on it.

Yours faithfully,

ANDREW PEMBERTON · EXECUTOR

DATE

THE FACTS

FULL NAME

David James Pemberton

BORN

3 April 1949

DIED

9 August 2026

ADDRESS

14 Beechwood Avenue
Harrogate HG2 8QT

POLICIES

Pension / Workplace AV5518

EXECUTOR

Andrew Pemberton

ENCLOSED

Certified death certificate — copy 05

PLEASE REPLY TO
Andrew Pemberton
3 Mill Lane
York YO1 7HT

✂ ----- DETACH · THE ADMINISTRATOR KEEPS THE LETTER, RETURNS THIS -----

ACKNOWLEDGEMENT · RETURN THIS CARD

A-03

We confirm the death of **David James Pemberton** is registered against the pension and the position at the date of death will follow in writing.

ACTIONED BY

BRANCH / TEAM

DATE

Return to: Andrew Pemberton, 3 Mill Lane, York YO1 7HT



Zurich Customer Services
Protection Operations
PO Box 4157
Swindon
SN4 4QB
10 September 2026

THE FACTS

FULL NAME
David James Pemberton

BORN
3 April 1949

DIED
9 August 2026

ADDRESS
14 Beechwood Avenue
Harrogate HG2 8QT

POLICIES
Home or contents policy ZH 2210

EXECUTOR
Andrew Pemberton

ENCLOSED
Certified death certificate — copy 06

Notification of the death of David James Pemberton

Dear Zurich Customer Services,

David James Pemberton, a customer of yours, died on 9 August 2026. I am their executor. Their details are set out on the right of this letter, and the lower card is yours to return. Please:

- 1 Register the death against the policies listed and confirm the cover position.
- 2 Note the home policy — the property may stand empty; please confirm cover.
- 3 Confirm the position at the date of death in writing, for the estate.
- 4 Complete and return the acknowledgement card below — the return address is printed on it.

Yours faithfully,

ANDREW PEMBERTON · EXECUTOR

DATE

PLEASE REPLY TO
Andrew Pemberton
3 Mill Lane
York YO1 7HT

✂ ----- DETACH · THE INSURER KEEPS THE LETTER, RETURNS THIS -----

ACKNOWLEDGEMENT · RETURN THIS CARD

Z-04

We confirm the death of **David James Pemberton** is registered against the policies and the position at the date of death will follow in writing.

ACTIONS BY

BRANCH / TEAM

DATE

Return to: Andrew Pemberton, 3 Mill Lane, York YO1 7HT



II

SECTION II

The Dates

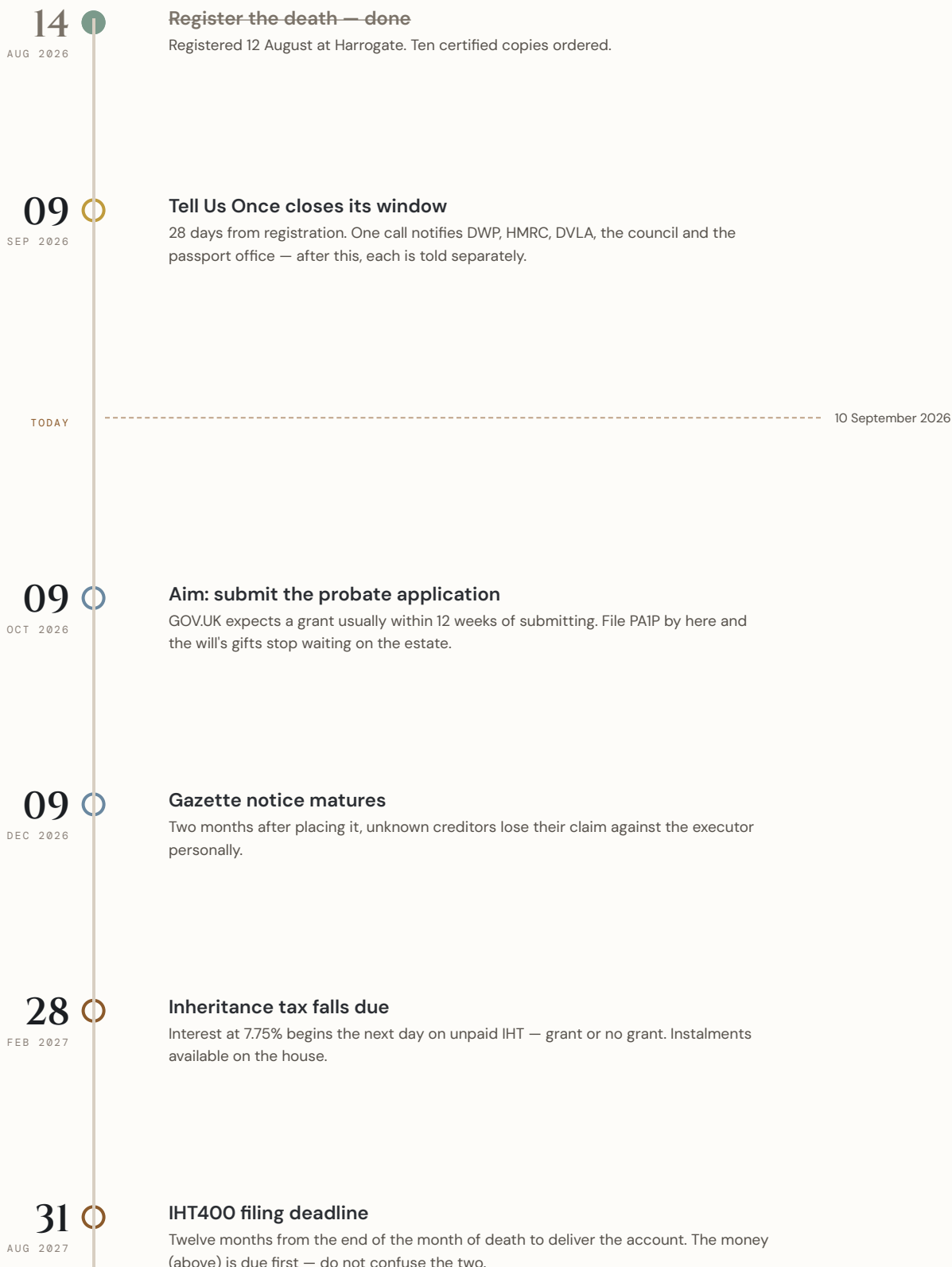
Every deadline this estate is on, computed from the date of death — and the certificate copies that serve them.

A copy reassures; the original proves.



The Six-Month Calendar

every deadline this estate is on — computed from 9 August 2026



Copper dates are statutory. Mark each one in the household diary the day this File arrives.



The Certificate Order Sheet

the week-one question, answered in four numbers and ten rows

PIECE 08 OF 8
the Pemberton household

10

CERTIFIED COPIES ORDERED

£12.50

EACH, AT REGISTRATION

£125.00

THE SET, 12 AUGUST

5

NEED NO COPY – TELL US ONCE

The copy ledger

COPY	WHERE IT GOES	WHY	SENT	HOME AGAIN
01	Stays in the pack	never leaves the house — the reference copy	– NEVER SENT	– ALWAYS HOME
02	Thornbury & Vane, Bath	probate application and the will	_____	_____
03	Nationwide	with Letter 03 — Joint current account 4471	_____	_____
04	Barclays	with Letter 04 — Sole current account •• 4488	_____	_____
05	Aegon	with Letter 05 — Pension / Workplace AV5518	_____	_____
06	Zurich	with Letter 06 — Home or contents policy ZH 2210	_____	_____
07	Spare	held — returned copies rejoin this pool	_____	_____
08	Spare	held	_____	_____
09	Spare	held	_____	_____
10	Spare	held	_____	_____

Who needs no copy

Tell Us Once covers five at a stroke — DWP, HMRC, DVLA, the council and the passport office are notified together, and none asks for a certificate. More needed later? The register office that holds the record — or the GRO — issues further copies at **£12.50**.

Certified copies come home — expect the pool to refill as institutions finish.

