VALOREN

Free institutional reference
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United Kingdom

Who to notify when someone dies

A blank record sheet. The organisations are printed; the answers are yours to write.

This is a blank. Nothing in it has been filled in for you, and nothing in it is specific to your household. It is the same sheet for everyone. Write on it.

Checked against each organisation's own published bereavement page, and against GOV.UK, on **11 September 2026**. Every row carries its own date. Figures change — check at source before you rely on one.

NOTIFICATION RECORD

NAME OF THE PERSON WHO DIED	
DATE OF DEATH	
DATE REGISTERED	
TELL US ONCE REFERENCE	
DATE THIS SHEET STARTED	
YOUR NAME	
YOUR RELATIONSHIP TO THEM	
YOUR PHONE	
YOUR EMAIL	

WHAT TO HAVE TO HAND

- ☐ Death certificate + certified copies (how many ordered: ____)
- ☐ National Insurance number
- ☐ NHS number
- ☐ Dates of birth and marriage
- ☐ Child Benefit or tax reference
- ☐ Tell Us Once reference · account and policy numbers

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THE TICK SHEET — PRINT THIS ON ITS OWN

Every category in one list. Tick when done; fill the date, reference and who you spoke to as you go.

	WHO	DATE TOLD	REFERENCE	WHO I SPOKE TO
☐	Registrar			
☐	Tell Us Once			
☐	Death Notification Service			
☐	Bereavement Register			
☐	Royal Mail redirection			
☐	Main current account			
☐	Second bank / building society			
☐	Credit cards			
☐	Mortgage or landlord			
☐	Council — Council Tax			
☐	Employer or former employer			
☐	State Pension / DWP			
☐	Private or workplace pension (1)			
☐	Private or workplace pension (2)			
☐	Life insurance			
☐	Home insurance			

	WHO	DATE TOLD	REFERENCE	WHO I SPOKE TO
☐	Motor insurance			
☐	Energy			
☐	Water			
☐	Broadband and phone			
☐	Mobile			
☐	TV Licensing			
☐	DVLA			
☐	Subscriptions and memberships			
☐	Other: _____			
☐	Other: _____			
☐	Other: _____			
☐	Other: _____			
☐	Other: _____			
☐	Other: _____			

SECTION A — THE TWO SERVICES, AND GOVERNMENT

Start here. These reach several organisations at once, and most of the government list besides.

SERVICE	WHAT IT REACHES	WHAT IT WILL NOT DO	DATE DONE	REFERENCE
Tell Us Once	HMRC, DWP, Passport Office, DVLA, the council, Veterans UK, Social Security Scotland, and listed public-sector pensions	Any bank, mortgage provider, insurer, utility, landlord or private pension. Use within 28 days of the reference		
Death Notification Service	Every participating bank and building society at once	Close, transfer or release anything — it notifies only		
The Bereavement Register	Removes the name and address from marketing mailing lists — free online registration	Stop account correspondence from a live account		
Royal Mail redirection	Redirects post to the executor's address	Notify anybody of the death		

BODY	REACHED BY TELL US ONCE	DATE TOLD	REFERENCE
HM Revenue and Customs	Yes	Covered by Tell Us Once	
Department for Work and Pensions	Yes	Covered by Tell Us Once	
HM Passport Office	Yes	Covered by Tell Us Once	
DVLA	Yes	Covered by Tell Us Once	
Local council (Council Tax, Housing Benefit, Blue Badge)	Yes	Covered by Tell Us Once	
Veterans UK	Yes	Covered by Tell Us Once	
Social Security Scotland	Yes	Covered by Tell Us Once	
Armed Forces / Civil Service / LGPS / NHS pension schemes	Yes	Covered by Tell Us Once	
Pension Protection Fund and Financial Assistance Scheme	Yes	Covered by Tell Us Once	
Scottish Public Pension Agency schemes	Yes	Covered by Tell Us Once	
Banks and building societies	No		
Mortgage providers	No		

BODY	REACHED BY TELL US ONCE	DATE TOLD	REFERENCE
Insurers — life, home, motor, travel	No		
Utilities, landlords and housing associations	No		
Personal and workplace pension schemes	No		

Only the five "No" rows above need a date — the "Yes" rows are already covered once Tell Us Once is used. Tell Us Once is not available in Northern Ireland: there, tell each body yourself (nidirect.gov.uk) and date every row. gov.uk and deathnotificationservice.co.uk, read 11 September 2026.

SECTION B — BANKS, BUILDING SOCIETIES AND CARDS

No bank is required by law to use any particular figure. An empty figure cell means the institution publishes none.

INSTITUTION	BEREAVEMENT LINE	FIGURE THEY PUBLISH	DATE TOLD	REFERENCE	WHO I SPOKE TO
Barclays checked 20 Aug 2026	0800 068 2238, opt 2	Sole accounts over £50,000			
HSBC UK checked 2 Sep 2026	0800 085 1992	£50,000 (will) / £25,000 (none)			
Lloyds Bank checked 20 Aug 2026	0800 015 0012	No fixed threshold published			
Halifax checked 20 Aug 2026	0800 015 0012	No general threshold (current/ savings)			
NatWest checked 10 Oct 2026	0800 161 5903	Sole accounts of £50,000 or over			
Santander UK checked 20 Aug 2026	0800 587 5870	Sole-name accounts over £50,000			

INSTITUTION	BEREAVEMENT LINE	FIGURE THEY PUBLISH	DATE TOLD	REFERENCE	WHO I SPOKE TO
Nationwide BS checked 20 Aug 2026	0800 464 3018	Sole accounts over £50,000			
TSB checked 20 Aug 2026	0345 835 7834	Photo ID mandatory online			
Monzo checked 20 Aug 2026	Online bereavement route	£25,000			
Starling Bank checked 20 Aug 2026	020 7930 4450	£30,000			
Chase UK checked 31 Aug 2026	0800 376 3333	No figure published			
first direct checked 31 Aug 2026	0113 276 6669	£50,000 with a will; £25,000 without			
Metro Bank checked 31 Aug 2026	0203 824 4815	£25,000			
Revolut UK checked 31 Aug 2026	In-app bereavement route	No figure published			
The Co-operative Bank checked 31 Aug 2026	03457 212 212	£50,000 (Co-op + smile combined)			

INSTITUTION	BEREAVEMENT LINE	FIGURE THEY PUBLISH	DATE TOLD	REFERENCE	WHO I SPOKE TO
Virgin Money checked 3 Sep 2026	0800 0121590	£50,000 — a form is accepted below that without a grant			
Leeds Building Society checked 31 Aug 2026	03452 682 642	£50,000			
Skipton Building Society checked 31 Aug 2026	0345 266 1209	£50,000 when a close relative is the executor (£5,000 for anyone else)			
Yorkshire Building Society checked 31 Aug 2026	0345 166 9229	£50,000			
NS&I checked 11 Sep 2026	nsandi.com bereavement route	£5,000 (a guide figure, not absolute)			
Other bank or card: _____					
Other bank or card: _____					
Other bank or card: _____					
Other bank or card: _____					
Other bank or card: _____					
Other bank or card: _____					

SECTION C — INSURERS, PENSIONS AND INVESTMENTS

A pension pays according to the expression of wishes — but only once the scheme knows. A policy written in trust pays the beneficiaries directly, outside the estate.

PROVIDER	WHAT IT IS	ROUTE / FIGURE	DATE TOLD	REFERENCE	WHO I SPOKE TO
Aviva checked 20 Aug 2026	Insurer	0345 268 2194			
Legal & General checked 20 Aug 2026	Insurer	Online bereavement route			
M&G / Prudential checked 31 Aug 2026	Insurer	Online bereavement route			
Standard Life checked 31 Aug 2026	Insurer / pension	Online bereavement route			
SunLife checked 31 Aug 2026	Insurer	0800 008 6060			
Nest Pensions checked 31 Aug 2026	Workplace pension	0300 020 1410			

PROVIDER	WHAT IT IS	ROUTE / FIGURE	DATE TOLD	REFERENCE	WHO I SPOKE TO
Vanguard UK checked 6 Sep 2026	Investment platform	£35,000			
Hargreaves Lansdown checked 6 Sep 2026	Investment platform	£50,000			
Fidelity checked 6 Sep 2026	Investment platform	£50,000			
Aviva Investors checked 6 Sep 2026	Investment platform	£50,000			
Aberdeen (abrdn) checked 6 Sep 2026	Investment platform	£75,000 (£15,000 onshore bond)			
AJ Bell checked 6 Sep 2026	Investment platform	No figure published			
interactive investor checked 6 Sep 2026	Investment platform	No figure published			
Moneybox checked 6 Sep 2026	Investment platform	No figure published			
J.P. Morgan Personal Investing checked 6 Sep 2026	Investment platform	No figure published			

PROVIDER	WHAT IT IS	ROUTE / FIGURE	DATE TOLD	REFERENCE	WHO I SPOKE TO
Other insurer / pension / platform: _____					
Other insurer / pension / platform: _____					
Other insurer / pension / platform: _____					
Other insurer / pension / platform: _____					
Other insurer / pension / platform: _____					
Other insurer / pension / platform: _____					

SECTION D — HOME, WATER AND ENERGY

None of this affects the estate. All of it generates post if left untold — only the account number and a phone call are needed.

ORGANISATION	SECTOR	BEREAVEMENT LINE	DATE TOLD	REFERENCE
British Gas checked 1 Sep 2026	Energy	0330 808 3880		
EDF checked 1 Sep 2026	Energy	03330 069 950		
E.ON Next checked 31 Aug 2026	Energy	0808 501 5035		
Octopus Energy checked 31 Aug 2026	Energy	Online bereavement route		
OVO Energy checked 31 Aug 2026	Energy	0330 175 9683		
Scottish Power checked 31 Aug 2026	Energy	0800 074 1986		
Utility Warehouse checked 31 Aug 2026	Energy	0333 005 8356		
Anglian Water checked 31 Aug 2026	Water	0800 141 2944		

ORGANISATION	SECTOR	BEREAVEMENT LINE	DATE TOLD	REFERENCE
Severn Trent checked 31 Aug 2026	Water	0345 7500 500		
Southern Water checked 31 Aug 2026	Water	0330 303 0368		
Thames Water checked 31 Aug 2026	Water	0800 009 4976		
United Utilities checked 31 Aug 2026	Water	0800 912 7249		
Yorkshire Water checked 31 Aug 2026	Water	0345 1 24 24 24		
Mortgage or landlord: _____				
Council tax: _____				
Home insurance: _____				
Motor insurance: _____				
TV licence: _____				
Garden or cleaning services: _____				
Care provider: _____				
Alarm or telecare: _____				

If the property will sit empty, tell the home insurer — many policies restrict cover after a period of unoccupancy, set by the policy, not by any general rule.

SECTION E — TELECOMS, DIGITAL, POST AND LICENCES

Stopping things, not valuing them — email, streaming, a credit file, a driving licence.

ORGANISATION	WHAT IT DOES / ROUTE	DATE TOLD	REFERENCE
BT checked 20 Aug 2026	0800 169 1663 or online form		
EE checked 1 Sep 2026	Online bereavement route		
giffgaff checked 31 Aug 2026	Online bereavement route		
O2 checked 31 Aug 2026	0800 090 18 20		
Plusnet checked 31 Aug 2026	0330 1239 123		
Sky checked 1 Sep 2026	Online bereavement route		
TalkTalk checked 31 Aug 2026	0345 172 0038		
Three UK checked 31 Aug 2026	0333 338 1400		
Virgin Media checked 31 Aug 2026	0800 952 2302		

ORGANISATION	WHAT IT DOES / ROUTE	DATE TOLD	REFERENCE
Vodafone UK checked 1 Sep 2026	0808 005 7450		
Amazon UK checked 31 Aug 2026	Closes account, ends Prime — online route		
Apple checked 31 Aug 2026	Digital Legacy contact, or closure — online route		
Facebook / Meta checked 31 Aug 2026	Memorialises or removes profile — online form		
Google checked 31 Aug 2026	Inactive Account Manager, or closure request		
Microsoft checked 31 Aug 2026	Account closure request — online route		
Netflix checked 31 Aug 2026	Cancels subscription — online account route		
PayPal UK checked 31 Aug 2026	Closes account, settles balance — online route		
Royal Mail checked 31 Aug 2026	Redirects post — redirection application		
Experian UK checked 1 Sep 2026	Flags credit file — online bereavement route		
TV Licensing checked 1 Sep 2026	Cancels/transfers, refunds — 0300 131 1261		
DVLA checked 20 Aug 2026	Licence + vehicle re-registration — via DVLA route		

ORGANISATION	WHAT IT DOES / ROUTE	DATE TOLD	REFERENCE
The Bereavement Register checked 11 Sep 2026	Stops advertising mail — free online registration		
Office of the Public Guardian checked 11 Sep 2026	LPA/EPA ends automatically on death — customerservices@publicguardian.gov.uk 0300 456 0300		

SECTION F — THE ONES ONLY YOU KNOW

Every household has its own list beyond the printed ones. Use the prompts below, and write in whatever the rest of this sheet did not cover.

EMPLOYER, AND ANY FORMER EMPLOYER HOLDING A PENSION

PROFESSIONAL BODIES, UNIONS AND MEMBERSHIPS

CLUBS, SOCIETIES AND PLACES OF WORSHIP

LOYALTY SCHEMES, STORE CARDS AND CATALOGUE ACCOUNTS

REGULAR DONATIONS AND STANDING ORDERS

ANYONE WHO HOLDS A KEY, A SPARE, OR SOMETHING OF THEIRS

Date of death: _____

Register by: _____

Tell Us Once by (28 days from the reference):

Bereavement Support Payment — claim by (3 months):

Inheritance Tax due by (end of the sixth month after the month of death):

WHERE THIS CAME FROM

Every source, and the date it was read. GOV.UK pages, deathnotificationservice.co.uk, nidirect.gov.uk, and every institution's own bereavement page — each institution's own date is printed against its row in Sections B to E, not repeated here.

gov.uk — register a death, Tell Us Once, Bereavement Support Payment, Funeral Expenses Payment, applying for probate `read 11 Sep 2026`

nidirect.gov.uk — registering a death in Northern Ireland `read 11 Sep 2026`

deathnotificationservice.co.uk `read 11 Sep 2026`

thebereavementregister.org.uk, cross-verified against cityoflondon.gov.uk `read 11 Sep 2026`

nsandi.com — bereavement route `read 11 Sep 2026`

gov.uk/power-of-attorney — Office of the Public Guardian contact route `read 11 Sep 2026`

Every bank, building society, insurer, pension provider, energy, water, telecoms and digital-account row: read from that organisation's own published bereavement page, on the date

printed against it in Sections B to E — sourced from **src/data/bereavement-contacts.json**, the same file valoren.uk/resources/uk-bereavement-contacts uses.

Investment-platform rows: valoren.uk/answers/investment-platform-probate-threshold, checked 6 Sep 2026.

valoren.uk/resources/who-to-notify-checklist

A blank record sheet. Nothing here is prepared for your household, and nothing is legal advice. Bereavement routes, thresholds and deadlines change — check at source before you rely on a figure. Rules differ in Scotland and Northern Ireland.

If you would rather not build this list yourself, The Family Handover Kit is the prepared version, £29 one-off — valoren.uk/family-handover-kit

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POWERED BY VALOREN

Who to notify when someone dies — a blank record sheet, free from the Valoren bereavement series. Accurate for the United Kingdom as of September 2026. Not legal or financial advice. © Standard Index Group.