

Account checklist

For the person dealing with the accounts of someone who has died. Work in this order: save first, close last.

Accounts of

Date of death

Handled by

1. Before you close anything

- ☐ Death registered and several copies of the death certificate ordered
- ☐ Grant of probate, letters of administration or court letters, if needed
- ☐ Government told: Tell Us Once (England, Scotland, Wales) or Social Security (US)
- ☐ Photos, files and emails saved before any account is closed
- ☐ Email account and mobile number kept running (transfer the number, don't cancel it)
- ☐ Be wary of unexpected debts, fees or "unclaimed inheritance" messages: check before paying anything

2. Banks and building societies

Organisation	Date contacted	Reference number	Documents sent	Data saved?	Outcome and date

3. Recurring payments and subscriptions

Organisation	Date contacted	Reference number	Documents sent	Data saved?	Outcome and date

4. Online money and payment accounts

Organisation	Date contacted	Reference number	Documents sent	Data saved?	Outcome and date
PayPal					

5. Utilities, insurers and everything else

Organisation	Date contacted	Reference number	Documents sent	Data saved?	Outcome and date

6. Social media

Organisation	Date contacted	Reference number	Documents sent	Data saved?	Outcome and date
Facebook					
Instagram					

7. Cloud, photos and devices

Organisation	Date contacted	Reference number	Documents sent	Data saved?	Outcome and date
Google					
Apple					

8. Last: email and the phone number

Organisation	Date contacted	Reference number	Documents sent	Data saved?	Outcome and date
Main email					
Mobile number					

GUIDES

Step-by-step help for each of these is at digitalinheritanceguide.com/after-a-death/. Companies change their processes, so check each one's official bereavement page.