The Family Handover Kit — the complete checklist

Everything a complete family handover kit contains — the seven parts, the deadlines they answer to, and the details each one needs. Fill it in over an afternoon. Keep it where your family would look.

F-16 · FAMILY

"Not a map of where things are. A plan they can act on."

FAMILY REFERENCE

HOUSEHOLD / FAMILY NAME	PREPARED BY
REVIEWED ON	**KEPT AT**

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PART 1 — WHO TO CALL FIRST

One named person, with a phone number that works. Everything else waits; this doesn't.

THE ONE CALL THAT MATTERS

- [ ] **Name the one person to call first**
  Not a committee — one name. This is the person your family calls before anyone or anything else.
  DATE RECORDED
- [ ] **Record a phone number that actually works**
  Test it. A number that reaches an old voicemail or a disconnected line is worse than no number at all.
  DATE RECORDED
- [ ] **Note their relationship to you**
  So whoever calls knows who they're reaching, and why that person is the right one.
  DATE RECORDED
- [ ] **Name a backup, in case the first person can't be reached**
  One name is the rule — but only if that one name is genuinely reachable at short notice.
  DATE RECORDED

PART 2 — WHERE THINGS ARE KEPT

The drawer, the safe, the solicitor's office — named, not assumed.

NAMED, NOT ASSUMED

- [ ] **Name the drawer or file where everyday paperwork lives**
  Not "somewhere in the study" — the actual drawer, box or folder.
  DATE RECORDED
- [ ] **Name the safe, and where its key or code is kept**
  A safe nobody can open is a very secure way of losing everything inside it.
  DATE RECORDED
- [ ] **Name the solicitor's office, if one holds anything**
  Firm name and contact, and what they hold — the will, deeds, or nothing at all.
  DATE RECORDED
- [ ] **List anywhere else assumed but never actually confirmed**
  A relative's loft, a bank's deposit box, a friend holding a spare key — write it down instead of assuming someone else knows.
  DATE RECORDED

PART 3 — THE LEGAL POSITION

Whether a will exists and where. Whether a Lasting Power of Attorney (**LPA**) is registered — and for what.

WILL AND LPA

- [ ] **Confirm whether a will exists**
  Yes, no, or unsure — write down whichever is true today.
  DATE RECORDED
- [ ] **Record where the will is held**
  Solicitor, bank, home safe, or the National Will Register.
  DATE RECORDED
- [ ] **Confirm whether an LPA is registered**
  A signed LPA that isn't registered with the Office of the Public Guardian cannot be used.
  DATE RECORDED

- [ ] **Record which type — property & financial affairs, health & welfare, or both**
  The two types of **LPA** cover different decisions; note which apply.
  DATE RECORDED

- [ ] **Name who holds a copy of the registered LPA**
  The attorney, a solicitor, or both — so it can be produced when it's needed.
  DATE RECORDED

PART 4 — THE MEDICAL ESSENTIALS

GP, medications, allergies. The questions a hospital asks in the first hour.

WHAT A HOSPITAL ASKS FIRST

- [ ] **Record the GP's name and surgery**
  The first call most hospitals make.
  DATE RECORDED

- [ ] **List current medications**
  Names and doses — not "the usual pills".
  DATE RECORDED

- [ ] **List known allergies**
  Medication, food, or otherwise — this changes what can safely be given.
  DATE RECORDED

- [ ] **Note existing medical conditions**
  Anything a treating clinician would need to know in the first hour.
  DATE RECORDED

- [ ] **Record next-of-kin contact details**
  The exact information a hospital's admissions desk asks for.
  DATE RECORDED

PART 5 — THE FINANCIAL PICTURE

Which banks, which policies, which pensions — names, not balances. Enough to notify, not enough to steal.

NAMES, NOT BALANCES

- [ ] **List which banks are used**
  Institution names only — enough to notify, not account numbers or balances.
  DATE RECORDED

- [ ] **List which insurance policies exist**
  Life, health, home — provider names, not the policy documents themselves.
  DATE RECORDED

- [ ] **List which pension providers are involved**
  Each provider needs separate notification later — a list now saves the search.
  DATE RECORDED

- [ ] **Note any other financial institutions worth notifying**
  Investment platforms, building societies — anything not already listed above.
  DATE RECORDED

PART 6 — DIGITAL ACCESS

The recovery routes for email and phone. Without these, half of modern life is simply locked.

RECOVERY ROUTES, NOT PASSWORDS

- [ ] **Record the recovery route for the main email account**
  The recovery email or phone number set on the account — not the password itself.
  DATE RECORDED
- [ ] **Record the recovery route for the phone account**
  The carrier's account-recovery process, PIN, or passcode procedure.
  DATE RECORDED
- [ ] **List other digital accounts a family would need to access**
  Cloud storage, photos, subscriptions holding anything that matters.
  DATE RECORDED
- [ ] **Note where a password manager's master details are kept**
  If one is used, record where the master password is stored — not the master password itself.
  DATE RECORDED

PART 7 — FUNERAL WISHES

Entirely optional — and one decision the family never has to make blind. A preference recorded in advance settles in a sentence what otherwise becomes a family debate on the hardest week.

THE ESSENTIALS

- [ ] **Record the preference: burial, cremation, or left to the family's judgement**
  Any of the three is an answer. The blank is the only version that costs the family something.
  DATE RECORDED
- [ ] **Note whether a funeral plan is already paid for, and with whom**
  Provider name only — the family can trace the rest. A paid plan nobody knows about is money spent twice.
  DATE RECORDED
- [ ] **Record where fuller wishes are written down, if anywhere**
  A letter of wishes, a note with the will, a page in this folder — named, not assumed.
  DATE RECORDED
- [ ] **Note anything specific to be honoured**
  Music, readings, a place, who should lead — the details that make it theirs.
  DATE RECORDED

THE DEADLINES THIS KIT ANSWERS TO

This kit exists because a real clock starts the moment it's needed. These are the deadlines it answers to in England and Wales.

WITHIN 5 DAYS

The death must be registered

Tell Us Once notifies most government departments in a single step — but only if the person registering has the National Insurance number, driving licence and passport to hand.

THE FIRST WEEKS

Banks, insurers and pension providers each need notifying

Each institution needs separate notification. A kit that lists which ones exist is the difference between a family notifying every provider and missing the ones nobody knew about.

PROBATE, IF NEEDED

Form PA1P (with a will) or PA1A (without)

The application fee is **£526**. Most of the work of applying is assembling information — exactly the information this kit already holds.

INHERITANCE TAX

Interest starts accruing six months after the end of the month of death

Where IHT is due, this is the clock. Families working from complete records meet it; families reconstructing an estate from scratch often don't.

This checklist is the paper version.

The kept-current version — a printed Start Here page, the household dossier behind it, an annual review to catch the drift — is what the Family Handover Kit maintains. valoren.uk/family-handover-kit

POWERED BY VALOREN

The Family Handover Kit — the complete checklist. A free reference listing everything a complete family handover kit contains: the seven parts, the UK deadlines they answer to, and the details each one needs. Free reference from the Valoren family series. Accurate for England & Wales as of July 2026. Not legal or financial advice.