

## FREE COMPANION SHEET

*Document Tracker*

One sheet for where every certificate, reference number and letter now lives  
– so nothing has to be found twice.

DOCUMENT	REFERENCE NO.	WHERE IT'S KEPT	DATE RECEIVED	NOTES / STATUS
Death certificate (certified copies)				
Will (original)				
Grant of Probate / Letters of Administration				
Tell Us Once reference number				
Property deeds / Land Registry title				
Life insurance policy				
Pension correspondence				
Bank account closure – 1				
Bank account closure – 2				
IHT correspondence (if applicable)				
Funeral invoice / receipt				

Print a fresh copy any time – the blank rows are there for whatever your own estate turns up that isn't on this list.

Lily &amp; Ledger

Organising documents and plain-English guides – not legal advice.  
For advice on a specific estate, a solicitor or licensed adviser is the right route.

– Holly