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**Succession Checklist**

Use this checklist to make sure that you have taken all the correct steps to allow the succession to take place.

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| **For ALL tenants:** | Tick when completed |
| Check that deceased tenant was NOT already a successor to this tenancy |  |
| Obtain a copy of the death certificate and place on file |  |
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| **For Spouse / Civil Partner/Partner:** |  |
| Copy of Marriage Certificate or Civil Partnership Registration Certificate obtained and placed on file or consider if living together as is were married or partners |  |
| Check that the Spouse / Civil Partner was living in the property as their only or principal home at the time of the tenant's death – bank statements, council tax, official correspondence etc. |  |
|  |  |
| **For Family Member:** |  |
| Check that the person(s) claiming succession is parent(s), grandparent(s), child(ren) (may be step/adopted children), grandchild(ren), brother, sister, aunt, uncle, aunt or niece to the deceased tenant |  |
| Check that they were living in the property as their only or principal home at the time of the tenant's death |  |
| Check that they had been living with the deceased tenant at any property for the 12 month period before the tenant's death – bank statements, council tax, official correspondence etc. |  |
| If under-occupying, please see section 3 of the succession procedures |  |
|  |  |
| **For Joint Tenant:** |  |
| Check that the person claiming succession was named on the tenancy agreement as joint tenant |  |
|  |  |
| **For ALL tenants:** |  |
| Details of tenancy changed on Orchard |  |
| Letter sent to new tenant informing them that they are now the tenant & that no further succession can take place, and copy placed on file |  |
| Tenancy Agreement booklet sent to the new tenant |  |

When completed, please keep a copy of this checklist on the tenant's house file.