BANSAND Families

Death and legal family formats in the UK: England and Wales

by Andy Hayward¹

The LawsAndFamilies Database – Aspects of legal family formats for same-sex and different-sex couples

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Based on the LawsAndFamilies questionnaire on legal family formats for same-sex and/or different-sex couples (Section 6 – Death)

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The six sections of the questionnaire

The interactive LawsAndFamilies Database is based on the <u>LawsAndFamilies</u> <u>questionnaire</u>, which consists of six sections:

Section 1 – Formalisation

Section 2 – Income and troubles

Section 3 – Parenting

Section 4 – Migration

Section 5 – Splitting up

Section 6 – Death

Papers and an interactive database

For each jurisdiction there are therefore six papers like this one. And each of these papers contains the full answers, references and explanations (given by

a legal expert for the jurisdiction concerned) to the questions in one of these six sections. All these papers can be found in open access at <u>www.LawsAndFamilies.eu</u>. There the user also has access to the <u>interactive</u> <u>part of the LawsAndFamilies Database</u>, which can be used to search the whole database and to create comparative overviews for different questions, different years, different countries and/or different legal family formats.

This website also contains references to publications analysing the results of the project, and to some other legal, sociological and statistical publications about same-sex and different-sex families. And it gives information about the methodology used for this questionnaire and database.

About the questionnaire

The <u>full text of the questionnaire</u> can be found in the paper: K. Waaldijk, J.M. Lorenzo Villaverde, N. Nikolina & G. Zago, 'The LawsAndFamilies questionnaire on legal family formats for same-sex and/or different-sex couples: Text of the questions and of the accompanying guidance document', *FamiliesAndSocieties Working Paper* 64(2016), www.familiesandsocieties.eu.

The <u>Guidance document</u> contained in that paper, asked the experts answering the questionnaire to make several assumptions. These included the assumption that the partners have been living together as a couple already for at least two years. Plus the assumption (except for certain questions in Section 4 – Migration) that both partners have the citizenship of the country where they are now both lawfully and habitually residing, and that this is also the country where their relationship would have been formalised and where it would be dissolved.

About the answers

This paper contains the answers, references and explanations – for one jurisdiction – to all questions in one of the six sections of the questionnaire. The answers are presented in columns. Each column is a coloured timeline, representing legal developments for one question for one legal family format.

The year at the top of each coloured timeline is the most recent year for which a question was answered by the author. In the timelines the years given above and below an answer indicate that the answer applied between a certain day in the lower year and a certain day in the higher year. The year "0000" means that the answer applied since an unknown year before 1965. See further the Guidance document.

The following answer codes and colours have been used:

Yes	Yes, this is so in the law of this country/jurisdiction, although possibly with a qualifying period of 24 months or less.
Yes, but	Yes, but with exceptions or restrictions, for example a qualifying period of 25 months or more, or only in most parts of the country/jurisdiction, or this is mostly a "dead letter".
No, but	No, but it may be so exceptionally, or in a very limited way, or in a few parts of the country/jurisdiction, or indirectly, or by using a different legal instrument, or legislation says no while some courts might say yes.
No	No, this is not so in the law of this country/jurisdiction.
Doubt	The law is unclear (the law does not "know" the answer).
?	No information was available.
N/A	Not applicable (for example because this family format is not available in this jurisdiction, or not for same-sex or different-sex couples).
Х	This question was not asked for this legal family format.
Open question	Question without answer codes like Yes and No.
Empty cell	For this year the question was not asked or not answered.

The six papers about England and Wales

The answers concerning England and Wales can be found in the <u>interactive</u> <u>database</u> and in the following six papers (all of which are published in open access in: K. Waaldijk et al. (eds.), *The LawsAndFamilies Database – Aspects of legal family formats for same-sex and different-sex couples*, Paris: INED, 2017, www.LawsAndFamilies.eu):

- Formalisation of legal family formats in the UK: England and Wales by Brian Sloan (Section 1)
- Income, troubles and legal family formats in the UK: England and Wales by Andy Hayward (Section 2)
- Parenting and legal family formats in the UK: England and Wales by Brian Sloan (Section 3)
- Migration and legal family formats in the UK: England and Wales by Andy Hayward (Section 4)
- Splitting up and legal family formats in the UK: England and Wales by Brian Sloan (Section 5)
- Death and legal family formats in the UK: England and Wales by Andy Hayward (Section 6)

So this paper is based on **Section 6 (Death)** of the <u>LawsAndFamilies</u> <u>questionnaire</u>, which contains questions about the following topics:

- 6.1 Tenancy continuation
- 6.2 Property at death
- 6.3 Inheritance
- 6.4 Inheritance tax
- 6.5 Survivor's pension
- 6.6 Wrongful death
- 6.7 General background regarding death

In the following pages of this paper, first the answer to question 6.7 is presented, followed by the answers to questions 6.1 to 6.6.

6.07 - General background regarding death (Open question) If you consider it useful to provide some general information or comments about (past, present or future) developments and trends in legal policy and case law in your country/jurisdiction, or information on other aspects (socio-legal, political, legal-cultural, etc.) that may be relevant for the understanding your answers above regarding death, then please do so here.

Source: A. Hayward, "Death and legal family formats in UK: England and Wales". In: K. Waaldijk et al. (eds.), *The LawsAndFamilies Database – Aspects of legal family formats for same-sex and different-sex couples*. Paris: INED, 2017, www.LawsAndFamilies.eu, <u>LawsAndFamilies-UK_EW-Section6.pdf</u> (please use this full citation when citing any information from this table).

Section: 6 - Death

Question: 6.01 - Tenancy continuation

When the partner who holds the rental contract dies, does the other partner then have a right to continue to rent the home?

Marı	Marriage		Registered partnership		Cohabitation	
diffsex	same-sex	diffsex	same-sex	diffsex	same-sex	
2016 Yes, but 1985	2016 Yes, but 2014	2016 N/A 0000	2016 Yes, but 2005	2016 Yes, but 2011	2016 Yes, but 2011	
Yes, but 1977	N/A 0000		N/A 0000	Yes, but 1989	Yes, but 1999	
Yes, but 0000				No 0000	No 0000	

Marriage		Registered partnership		Cohabitation	
diffsex	same-sex	diffsex	same-sex	diffsex	same-sex
References to legal sourc Article 86A(1) of the Housir the Localism Act 2011.		References to legal source Section 87 of the Housing 2 the Localism Act 2011. Schedule 8 para 20 of the o	Act 1985 as amended by	References to legal source Rent Act 1977.Section 87 of the Housing A the Localism Act 2011.Housing Act 1988.Human Rights Act 1998.Fitzpatrick v Sterling Housing 27 (House of Lords).Ghaidan v Godin-Mendoza Lords).	Act 1985 as amended by ng Association [2001] 1 AC

Marriage	Registered	partnership	Cohabitation	
diffsex same-sex	diffsex	same-sex	diffsex	same-sex
 Explanations and nuances: This is a complex area and is dependent on the type of tenancy concerned. A distinction must be made between public and private sector. Succession in the private sector will only apply if the rental contract so provides (which is unlikely). Succession in the public sector is more prevalent. Succession by a spouse is permitted as per article 86A(1) of the Housing Act 1985 as inserted by article 160 of the Localism Act 2011. The precursor to this provision allowed succession by a spouse but this was updated by the Localism Act. Earlier protections for tenants were also found in the Rent Act 1977 but these can no longer be made in light of subsequent Housing Acts. 	private sector will only app provides (which is unlikely Succession in the public se Succession by a civil partn	l is dependent on the type istinction must be made e sector. Succession in the oly if the rental contract so). ector is more prevalent. er is permitted as per ng Act 1985 which involves 8 para 20 of the Civil	 Explanations and nuance. This is a complex area and of tenancy concerned. A di between public and private private sector will only app provides (which is unlikely) Succession in the public set Succession by a cohabitant through article 86A(1) of the virtue of article 86A(5) statist the tenant's wife, husband partners will be treated as A different-sex cohabitant succeed to their deceased when the Housing Act 1988 1977 and enabled couples husband and wife to be tree succession purposes. Same-sex cohabitants were partner's tenancy as a mer as seen in the House of Loo v Sterling Housing Associatt Following the introduction 1998 bringing into effect at rights enshrined in the Eur Human Rights, the House of Ghaidan v Godin-Mendoza position for same-sex coha to succeed to a stronger st (previously reserved for sp 	is dependent on the type istinction must be made e sector. Succession in the oly if the rental contract so ol. ector is more prevalent. It is permitted indirectly he Housing Act 1985 by ing that a person living as or as if they were civil a spouse or civil partner. was originally able to partner's tenancy in 1989 8 amended the Rent Act living together as eated as such for e able to succeed to their mber of the tenant's family rds decision in Fitzpatrick tion handed down in 1999. of the Human Rights Act t a domestic level the ropean Convention on of Lords decision in a strengthened the legal abitants by allowing them ratutory tenancy

Source: A. Hayward, "Death and legal family formats in UK: England and Wales". In: K. Waaldijk et al. (eds.), *The LawsAndFamilies Database – Aspects of legal family formats for same-sex and different-sex couples*. Paris: INED, 2017, www.LawsAndFamilies.eu, <u>LawsAndFamilies-UK_EW-Section6.pdf</u> (please use this full citation when citing any information from this table).

Section: 6 - Death

Question: 6.02 - Property at death

When one partner dies, do statutory rules consider as joint property any possessions acquired by either of them after they started this type of relationship? (In other words: would the surviving partner be deemed to own 50% of these possessions, while the other 50% are subject to relevant rules of inheritance law?)

Marriage		Registered partnership		Cohabitation	
diffsex	same-sex	diffsex	same-sex	diffsex	same-sex
2016 No, but 1925	2016 No, but 2014	2016 N/A 0000	2016 No, but 2005	2016 No, but 1976	2016 No, but 1976
	N/A 0000		N/A 0000	No 0000	No 0000
References to legal sources: Administration of Estates Act 1925. Inheritance (Provision for Family and Dependants) Act 1975. Law Reform (Succession) Act 1995. Inheritance and Trustees' Powers Act 2014.		References to legal source Administration of Estates A Inheritance (Provision for I Act 1975. Law Reform (Succession) A Article 71 and Schedule 4 p Partnership Act 2004. Inheritance and Trustees'	Act 1925. Family and Dependants) Act 1995. paragraphs 7-12 Civil	References to legal sourc Inheritance (Provision for F Act 1975 (in force 1 April 19 Law Reform (Succession) A Schedule 4 para 15(5) Civil	Family and Dependants) 976). ct 1995.

Marriage	Registered	Registered partnership		itation
diffsex same-sex	diffsex	same-sex	diffsex	same-sex
 Explanations and nuances: There is no concept of joint property following death of a spouse. The surviving spouse, however, can claim several entitlements under inheritance rules or through a will if the individual died testate. In the case of intestate succession the surviving spouse is always entitled to personal chattels of the deceased (see article 55(1)(x) of the Administration of Estates Act 1925 as amended by article 3(1) of the Inheritance and Trustees' Powers Act 2014. Where there is no children or other descendants, the surviving spouse will receive the whole of the estate (article 1(2) of the Inheritance and Trustees' Powers Act 2014 amending the Administration of Estates Act 1925). Personal property will be included. Where there are children, the surviving spouse receives, all personal property, a statutory legacy of £250,000 and an absolute interest in half of the remainder. The other half is divided equally between the children (article 1(2) of the Inheritance and Trustees' Powers Act 2014 amending the Administration of Estates Act 1925). A spouse would also be able to claim under Inheritance (Provision for Family and Dependants) Act 1975. Thus whilst some rules may create equal division of assets depending on the facts, property is not treated as 'joint property'. 	of a civil partner. The surv however, can claim severa inheritance rules or throu died testate. In the case of intestate su partner is entitled to perse deceased. Where there is no childrer surviving civil partner will estate (article 1(2) of the la Powers Act 2014 amendin Estates Act 1925). Persona Where there are children, receives, all personal prop £250,000 and an absolute remainder. The other half the children (article 1(2) of Trustees' Powers Act 2014 Administration of Estates A civil partner would be al Inheritance (Provision for Act 1975.	nt property following death iving civil partner, al entitlements under gh a will if the individual ccession the surviving civil onal chattels of the n or other descendants, the receive the whole of the nheritance and Trustees' og the Administration of al property will be included. the surviving civil partner perty, a statutory legacy of interest in half of the is divided equally between f the Inheritance and amending the Act 1925). ble to claim under Family and Dependants)	Explanations and nuance A surviving partner who was partnership with the decear right to inherit their estates provided for through a will For opposite-sex cohabitant claim under Inheritance (Pro Dependants) Act 1975 (eith 1995 or prior to that as sort maintained by the deceased death). Same-sex cohabitant own right from 2005 and p who was being maintained	as not married or in a civil sed has no automatic . However they could be

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Section: 6 - Death

Question: 6.03 - Inheritance

When one partner dies without testament, is the other partner then an inheritor?

Marriage		Registered partnership		Cohabitation	
diffsex	same-sex	diffsex	same-sex	diffsex	same-sex
2016 Yes 1925	2016 Yes 2014	2016 N/A 0000	2016 Yes 2005	2016 No, but 1976	2016 No, but 1976
	N/A 0000		N/A 0000	No 0000	No 0000
References to legal sources: Administration of Estates Act 1925. Inheritance and Trustees' Powers Act 2014.		References to legal sources: Administration of Estates Act 1925. Article 71 and Schedule 4 paragraphs 7-12 Civil Partnership Act 2004. Inheritance and Trustees' Powers Act 2014.		References to legal sour Article 1(1)(e) of the Inheri Family and Dependants) A	itance (Provision for

Marriage		Registered partnership		Cohabitation	
diffsex	same-sex	diffsex	same-sex	diffsex	same-sex
Explanations and nuand They are not deemed an entitled to provision under In the case of intestate su spouse is always entitled the deceased (see article Administration of Estates article 3(1) of the Inherita Powers Act 2014. Where there is no children the surviving spouse will estate (article 1(2) of the I Powers Act 2014 amendin Estates Act 1925). Person included. Where there are children receives, all personal prop of £250,000 and an absol remainder. The other half between the children (art Inheritance and Trustees) amending the Administra	'inheritor' but will be er intestacy rules. Accession, the surviving to personal chattels of 55(1)(x) of the Act 1925 as amended by nce and Trustees' n or other descendants, receive the whole of the inheritance and Trustees' ng the Administration of al property will be , the surviving spouse perty, a statutory legacy ute interest in half of the f is divided equally icle 1(2) of the ' Powers Act 2014	the estate (article 1(2) of Trustees' Powers Act 201 Administration of Estates property will be included Where there are children partner receives, all pers legacy of £250,000 and a of the remainder. The oth between the children (articles)	'inheritor' but will be er intestacy rules. Accession, the surviving personal chattels of the en or other descendants, will receive the whole of the Inheritance and 4 amending the 5 Act 1925). Personal , the surviving civil onal property, a statutory n absolute interest in half her half is divided equally cicle 1(2) of the	Explanations and nuane A surviving partner who we civil partnership with the automatic right to inherit therefore cannot inherit make a claim for provision estate as someone who i death of the deceased was either wholly or partly, by	was not married or in a deceased has no their estate. They as a cohabitant but could on out of the deceased's mmediately prior to the as being maintained,

Source: A. Hayward, "Death and legal family formats in UK: England and Wales". In: K. Waaldijk et al. (eds.), *The LawsAndFamilies Database – Aspects of legal family formats for same-sex and different-sex couples*. Paris: INED, 2017, www.LawsAndFamilies.eu, <u>LawsAndFamilies-UK_EW-Section6.pdf</u> (please use this full citation when citing any information from this table).

Section: 6 - Death

Question: 6.04 - Inheritance tax

Is the surviving partner exempted from paying inheritance tax (or required to pay less than a mere friend would have to pay)?

Marriage		Registered partnership		Cohabitation	
diffsex	same-sex	diffsex	same-sex	diffsex	same-sex
2016 Yes 1975	2016 Yes 2014	2016 N/A 0000	2016 Yes 2005	2016 No 0000	2016 No 0000
No 0000	N/A 0000		N/A 0000		
	ferences to legal sources:References to legal sources:ticle 18 of Inheritance Act 1984.Article 18 of Inheritance Act 1984 as amended by Article 7(5) of the Tax and Civil Partnerships Regulations 2005 (S.I. 2005/3229).		References to legal sour	ces:	
Explanations and nuances: Transfers between spouses are exempt from inheritance tax. This exemption was first introduced in 1975.		Explanations and nuances: Civil partners were included into the spousal exemption following the Civil Partnership Act 2004.		Explanations and nuances: There is no exemption for cohabitants, similat that of married couples or civil partners, in the payment of inheritance tax.	

Source: A. Hayward, "Death and legal family formats in UK: England and Wales". In: K. Waaldijk et al. (eds.), *The LawsAndFamilies Database – Aspects of legal family formats for same-sex and different-sex couples*. Paris: INED, 2017, www.LawsAndFamilies.eu, <u>LawsAndFamilies-UK_EW-Section6.pdf</u> (please use this full citation when citing any information from this table).

Section: 6 - Death

Question: 6.05 - Survivor's pension

When one partner dies while being employed, is the surviving partner then normally entitled to a survivor's pension? (For example on the basis of statutory law, and/or on the basis of a collective labour agreement or arrangements of the employer.)

Marriage		Registered partnership		Cohabitation	
diffsex	same-sex	diffsex	same-sex	diffsex	same-sex
2016 Yes 1988	2016 Yes, but 2014	2016 N/A 0000	2016 Yes, but 2005	2016 No, but 0000	2016 No, but 0000
Yes, but 1978	N/A 0000		N/A 0000		
No 0000					

Marriage	Registered	Registered partnership		Cohabitation	
diffsex same-sex	diffsex	same-sex	diffsex	same-sex	
References to legal sources:Social Security and Pensions Act 1975 enterininto force in 1978.Social Security and Pensions Act 1986 enterininto force in 1988.Pensions Schemes Act 1993.Pensions Act 1995.Pensions Act 2007.Pensions Act 2008.Pensions Act 2011.Pensions Act 2014.HM Government, "Review of Survivor Benefit Occupational Pension Schemes" (2014).Walker v Innospec and others [2015] EWCA of 1000.	Pensions Act 1995. Pensions Act 2007. Pensions Act 2008. Equality Act 2010 Schedu Pensions Act 2011. Pensions Act 2014. HM Government, "Review Occupational Pension Sc Walker v Innospec and o 1000.	993. Ile 9 para 18. w of Survivor Benefits in hemes" (2014).	References to legal sources: Pensions Schemes Act 1993.Pensions Act 1995.Pensions Act 2007.Pensions Act 2008.Pensions Act 2011.Pensions Act 2014.		

Marriage		Registered partnership		Cohabitation	
diffsex	same-sex	diffsex	same-sex	diffsex	same-sex
Explanations and nuand This is a complex area an terms of the pension sche Act survivors of occupatio entitlement but only if the extended to men in 1986 pensions were first introd Generally dependants for schemes include spouses scheme is dependent on scheme has "contracted of state pension (i.e. the me National Insurance Contr has contracted out then the employer must pay survive When same-sex marriage survivor pensions for sam limited to rights accrued of (when the Civil Partnersh force): this difference in the not contrary to the Equal	d is dependent on the eme. Prior to the 1986 onal schemes could claim ey were women. This was with effect in 1988. State duced in 1908. The purposes of these s. Entitlement under the whether the pension out" of the additional mbers pay reduced ibutions). If the scheme the private sector ving spouses. e was introduced in 2014, he-sex spouses could be since 5 December 2005 ip Act 2004 came into reatment is legislatively	employer must pay survi only taking into account s	d is dependent on the eme. Generally partners. Entitlement endent on whether the tracted out" of the (i.e. the members pay fice Contributions). If the ut then the private sector ving civil partners but service since 5 December ed in the Equality Act 2010 he Court of Appeal in	Explanations and nuan This is a complex area an terms of the pension sch mandated to do so, man enable members to nom someone to receive survi the scheme member dies	nd is dependent on the eme. Whilst not y occupational schemes inate their partner as ivor benefits in the event

Source: A. Hayward, "Death and legal family formats in UK: England and Wales". In: K. Waaldijk et al. (eds.), *The LawsAndFamilies Database – Aspects of legal family formats for same-sex and different-sex couples*. Paris: INED, 2017, www.LawsAndFamilies.eu, <u>LawsAndFamilies-UK_EW-Section6.pdf</u> (please use this full citation when citing any information from this table).

Section: 6 - Death

Question: 6.06 - Wrongful death

In case of wrongful death of one partner, is the other partner then entitled to compensation from the wrongdoer?

Marriage		Registered partnership		Cohabitation	
diffsex	same-sex	diffsex	same-sex	diffsex	same-sex
2016 Yes 1976	2016 Yes 2014	2016 N/A 0000	2016 Yes 2005	2016 Yes, but 1983	2016 Yes, but 2005
Yes 0000	N/A 0000		N/A 0000	No 0000	No 0000
References to legal sources: Fatal Accidents Act 1976.		References to legal sources: Fatal Accidents Act 1976.		References to legal sources: Fatal Accidents Act 1976.	
		Article 83 of the Civil Partnership Act 2004.		Adminsitration of Justice Act 1982.	
				Article 83 of the Civil Partnership Act 2004.	

Marriage		Registered partnership		Cohabitation	
diffsex	same-sex	diffsex	same-sex	diffsex	same-sex
Explanations and nuances: A "dependant" who is entitled to benefit from an action under the Fatal Accidents Act 1976 is defined as including the spouse of the deceased (article 1(3)(a) Fatal Accidents Act 1976). Dependants can claim for funeral expenses, statutory bereavement damages and damages for loss of financial support and services from the deceased.		Explanations and nuances: A "dependant" who is entitled to benefit from an action under the Fatal Accidents Act 1976 is defined as including the civil partner of the deceased (article 1(3)(aa) Fatal Accidents Act 1976 inserted by article 83 of the Civil Partnership Act 2004). Dependants can claim for funeral expenses, statutory bereavement damages and damages for loss of financial support and services from the deceased.		 Explanations and nuances: Cohabitants are able to bring a claim as "any person who for the whole of the period of two years immediately preceding the death was living in the same household as the deceased as the deceased's spouse or civil partner (article 1(3)(b) Fatal Accidents Act 1976 as substituted in 1983 by the Administration of Justice Act 1982, and as amended in 2005 by article 83 of the Civil Partnership Act 2004). However they are excluded from bringing a claim for damages for bereavement under article 1A Fatal Accidents Act 1976. 	