**My “When I’m Gone List” – Personal / Financial Details and Funeral Wishes**

*If you choose to complete this document, it is really important that you keep it in a secure place at all times as it will contain sensitive and confidential information.*

*A secure place may be a safe, a locked filing cabinet or at your solicitor’s office. Please do not leave it in an unsecure location.*

*Please do not write security information about your accounts such as passwords or PIN numbers in this document.*

|  |
| --- |
| My Personal Details |

|  |  |
| --- | --- |
| Full Name |  |
| Date and Place of Birth |  |
| Other Names |  |
| National Insurance No |  |
| Tax Reference No |  |
| Passport Number |  |
| Driving Licence Number |  |
| Delete as appropriate: | I am / am not an organ donor |

|  |
| --- |
| Next of Kin or Key Contact |

|  |  |
| --- | --- |
| Full Name |  |
| Relationship |  |
| Phone Number |  |
| Address |  |
|  |
| Email |  |

|  |
| --- |
| My Important Documents |

You can use this section to note down what important documents you have, such as a Will, and where they are kept. This will help your family trace them when they need to.

|  |  |
| --- | --- |
| WILL | |
| I have made a Will and it is kept |  |
| My most recent Will is dated |  |
| I have a letter of wishes and it is kept |  |

**My executors are:**

|  |  |
| --- | --- |
| Name |  |
| Address |  |
|  |
| Phone |  |
| Email |  |

|  |  |
| --- | --- |
| Name |  |
| Address |  |
|  |
| Phone |  |
| Email |  |

|  |  |
| --- | --- |
| Funeral Plan | |
| I have a funeral plan with |  |
| My funeral plan documents are kept |  |

|  |  |  |
| --- | --- | --- |
| Power of Attorney | | |
| I have a Power of Attorney | Yes  No | |
| It is dated |  | |
| It is registered with the Office of the Public Guardian | | Yes  No |

**My Attorneys are:**

|  |  |
| --- | --- |
| Name |  |
| Address |  |
|  |
| Phone |  |

|  |  |
| --- | --- |
| Name |  |
| Address |  |
|  |
| Phone |  |

|  |
| --- |
| Other Important Documents and Where I Keep Them |

|  |  |
| --- | --- |
| My birth certificate |  |
| Marriage certificate |  |
| Passport |  |
| Other |  |
|  |

|  |
| --- |
| My Funeral Wishes |
| Thinking through and talking to your loved ones about how you’d like your funeral to be – and what you don’t want - will take away a lot of worry and uncertainty for them.  Writing down your wishes means they’ll have something to reassure them they’re doing what you would have wanted. |

Things you might want to think about:

|  |  |
| --- | --- |
| * Funeral service – would you like one, what type and where? * Who would you like to carry out the funeral service? * Would you like an announcement to be made in a newspaper and if so, which one(s)? * If you’re to be buried, where you’d like this to be (and details of any plot you’ve purchased). * If you’re to be cremated, where this should be and what you’d like to happen to your ashes. * What music, prayers and readings you’d like. | * Would you like people to wear black or not? * Who you’d like to be invited. * If there’s anyone you’d particularly like to speak at your funeral. * Would you want flowers or donations and if so, which charities should these go to? * Where you’d like any post-funeral gathering to be. * Would you like a memorial and what should it be? |

**Write your funeral wishes here**

|  |
| --- |
|  |

|  |
| --- |
| My Financial Details |

**Current Accounts**

|  |  |
| --- | --- |
| Bank/Building Society |  |
| Name(s) in which account is held |  |

|  |  |
| --- | --- |
| Bank/Building Society |  |
| Name(s) in which account is held |  |

**Savings Accounts**

|  |  |
| --- | --- |
| Bank/Building Society |  |
| Name(s) in which account is held |  |

|  |  |
| --- | --- |
| Bank/Building Society |  |
| Name(s) in which account is held |  |

**Mortgage**

|  |  |
| --- | --- |
| Bank/Building Society |  |
| Name(s) in which account is held |  |

**Credit and Store Cards**

|  |  |
| --- | --- |
| Issuer name |  |
| Card number |  |

|  |  |
| --- | --- |
| Issuer name |  |
| Card number |  |

|  |  |
| --- | --- |
| Issuer name |  |
| Card number |  |

|  |  |
| --- | --- |
| Issuer name |  |
| Card number |  |

|  |  |
| --- | --- |
| Issuer name |  |
| Card number |  |

**Pensions**

(This could include a final salary pension from an employer, schemes you joined through your employer and pension schemes you’ve set up yourself).

|  |  |
| --- | --- |
| Company |  |
| Phone number |  |
| Plan number |  |
| Where documents are kept |  |

|  |  |
| --- | --- |
| Company |  |
| Phone number |  |
| Plan number |  |
| Where documents are kept |  |

|  |  |
| --- | --- |
| Company |  |
| Phone number |  |
| Plan number |  |
| Where documents are kept |  |

**Life Insurance**

|  |  |
| --- | --- |
| Company |  |
| Phone number |  |
| Policy number |  |
| Where documents are kept |  |

**Annuity Policy**

|  |  |
| --- | --- |
| Provider name |  |
| Policy number |  |
| Where documents are kept |  |

**Investments**

|  |  |
| --- | --- |
| Provider name |  |
| Name(s) in which account is held |  |
| Phone number |  |

**Shares**

|  |  |
| --- | --- |
| Company name |  |
| Where certificate is kept |  |

|  |  |
| --- | --- |
| Company name |  |
| Where certificate is kept |  |

**Car Insurance**

|  |  |
| --- | --- |
| Car insurance company |  |
| Policy number |  |
| Renewal date |  |
| Where documents are kept |  |

**Car Breakdown Cover**

|  |  |
| --- | --- |
| Provider Name |  |
| Renewal date |  |
| Where documents are kept |  |

**House Insurance - Contents**

|  |  |
| --- | --- |
| Provider name |  |
| Policy number |  |
| Renewal date |  |
| Where documents are kept |  |

**House Insurance - Buildings**

|  |  |
| --- | --- |
| Provider name |  |
| Policy number |  |
| Renewal date |  |
| Where documents are kept |  |

**Other Insurance (pet/travel/boiler cover etc)**

|  |  |
| --- | --- |
| Provider name |  |
| Policy number |  |
| Renewal date |  |
| Where documents are kept |  |

|  |  |
| --- | --- |
| Provider name |  |
| Policy number |  |
| Renewal date |  |
| Where documents are kept |  |

|  |  |
| --- | --- |
| Provider name |  |
| Policy number |  |
| Renewal date |  |
| Where documents are kept |  |

**Loans/Hire Purchase**

|  |  |
| --- | --- |
| Loan provider |  |
| Phone number |  |
| Where documents are kept |  |

|  |  |
| --- | --- |
| Loan provider |  |
| Phone number |  |
| Where documents are kept |  |

**Benefits/Entitlements**

|  |  |
| --- | --- |
| Name of benefit |  |
| Name of benefit |  |
| Name of benefit |  |

**Rental Agreement**

|  |  |
| --- | --- |
| Landlord’s name |  |
| Landlord’s contact details |  |

**Utility Providers**

|  |  |
| --- | --- |
| My gas provider is |  |
| My electricity provider is |  |
| My water company is |  |
| My broadband provider is |  |
| My phone company is |  |
| My mobile phone provider is |  |
| My TV provider is |  |
| My local council (for council tax) is |  |

**Regular Payments**

|  |  |  |
| --- | --- | --- |
|  | **Organisation** | **Payment Type (eg Direct Debit)** |
| Charity |  |  |
| Charity |  |  |
| Club Membership |  |  |
| Club Membership |  |  |
| Subscription |  |  |
| Subscription |  |  |
| Other |  |  |

|  |
| --- |
| Significant Possessions |

**Property**

|  |  |
| --- | --- |
| Address |  |
|  | |

|  |  |
| --- | --- |
| Address |  |
|  | |

**Vehicle(s)**

|  |  |
| --- | --- |
| Registration Number |  |
| Registration Number |  |

**Other significant possessions/valuables**

|  |  |  |
| --- | --- | --- |
| **Description** | **Value** | **Where Kept** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |
| --- |
| Useful Contacts |

Use this section to make a note of anyone else you think should be notified of your death.

|  |  |  |
| --- | --- | --- |
|  | **Name** | **Phone/Email** |
| Solicitor |  |  |
| Accountant |  |  |
| Financial Adviser |  |  |
| Doctor |  |  |
| Dentist |  |  |
| Optician |  |  |
| Organisations/Societies |  |  |
| Neighbours (with keys) |  |  |

|  |  |
| --- | --- |
| Digital Accounts | |
| Digital assets - from photos and videos stored online to social media accounts - can be just as important as your other possessions. But how will your family know what you’ve got? Having a list will remove the guesswork for them. Your list might include any of the following: | |
| * Social media accounts (for example, Facebook, Twitter, LinkedIn) * Email accounts * Online financial accounts * Online auction/selling accounts (for example, eBay, Gumtree) * Online file storage | * Digital records – videos, photos and other files * Music libraries and e-books * Blogs and websites you own * Digital currency * Computer game characters * Online gambling accounts |
| **My Digital Accounts** | |
|  | |

|  |
| --- |
| Arrangements for Children |
| If you have children who are still minors (under 16 in Scotland or under 18 in the rest of the UK) it is important to appoint guardians (the people you would want to raise and care for them if you were no longer around).  The best place to do this is in a Will, as you can specify what assets should be used for your children’s everyday needs and whether they should inherit any assets when they reach a specified age. You can also say how they should be raised. |

|  |
| --- |
| Arrangements for Pets |
| If you have pets, use the space below to make a note of what arrangements you’d like to be made for them. |
|  |