

Life Planning – Useful Information Form

This is not a will. It does not deal with what should happen to your property or savings.

We would always advise you to make a will, otherwise your possessions will be distributed according to legal regulations rather than your own wishes.

You only need to fill in the bits that cover what you have. After filling it in, store it in a safe and secure place. Let a person you trust know because it will contain confidential details that could help people access your property.

Personal information

My name _____

My address _____

Postcode _____ Tel No _____

Occupation _____

Date of Birth _____ Place of Birth _____

Name of spouse/late spouse/partner (delete whichever does not apply)

Where to find my Will

If you don't have a Will, contact your solicitor for help

The location of my Will is _____

The date of my latest Will is _____

Medical information

My NHS number is _____

The location of my medical card is _____

Doctor's name _____

Doctor's address _____

Postcode _____ Tel No _____

People to contact following my death

Relatives and friends

Name _____

Address _____

Postcode _____ Tel No _____

Name _____

Address _____

Postcode _____ Tel No _____

Name _____

Address _____

Postcode _____ Tel No _____

My Solicitor

Company name _____

Address _____

Postcode _____ Tel No _____

Registrar of Births, Marriage and Deaths

Address _____

Postcode _____ Tel No _____

Note: Ask for two copies of the Death Certificate in order to claim assets. A death may be registered at any local registration office, but this may delay things as the papers will need to be sent to the area in which the death occurred.

Financial contacts

Bank

Name and address of bank _____

Postcode _____ Tel No _____

Accountant

Person to contact _____

Name and address of company _____

Postcode _____ Tel No _____

Tax Advisor

Person to contact _____

Name and address of company _____

Postcode _____ Tel No _____

Insurance companies/broker

Type of insurance policy _____

Name and address of company _____

Postcode _____ Tel No _____

Type of insurance policy _____

Name and address of company _____

Postcode _____ Tel No _____

Make the relevant claims resulting from any insurance policies held.

Inform the Inspector of Taxes

Address _____

Postcode _____ Reference No _____

Inform Social Security Office (for example, Pension Service)

Address _____

Postcode _____ Reference No _____

Check if dependants are entitled to any benefits.

If necessary, notify the following companies (for example, gas, electricity, water and telephone suppliers).

Name and Tel No _____

Name and Tel No _____

Name and Tel No _____

Council tax/rent departments

Address and Tel No _____

Other services to contact (for example, newsagent, milkman)

Other instructions (Remember this is not a will – do not leave instructions on this form about what you wish to be done with your money and possessions.)

Where to find things

House keys (including spare sets) _____

Birth Certificate _____ Marriage Certificate _____

Passport/identity cards _____

Insurance policies _____

Stocks/shares certificates _____

Deeds of house _____

Lease of property _____

Bank/Building society/PO savings books _____

Rent Book _____

Bank/Credit cards _____

Premium Bond certificates _____

Pension documents _____

Income tax papers _____

Car keys _____

Log book and insurance certificates _____

Computer details (for example, password, email addresses, company support desk)

Mobile phone details (for example, supplier, contract, number)

Where to find my debts

Loans _____

Mortgages _____

Hire purchase agreements _____

Credit agreements _____

Other liabilities _____

Further information

Please use this space to continue entries from earlier sections, or to provide information not previously covered.
