



## **IN CASE OF EMERGENCY DOCUMENT ORGANISING YOUR AFFAIRS**

## Organising your affairs

It can be easy to misplace important documents or information. Juggling saving accounts, pensions, and more can make it difficult to keep track of where everything is. This document is designed to help you organise your affairs and have all the details in a single place when you need them.

Organising your affairs can seem like a chore, but taking this step now can make tasks much easier in the future. It's also a useful exercise to gain a complete picture of your life and assets.

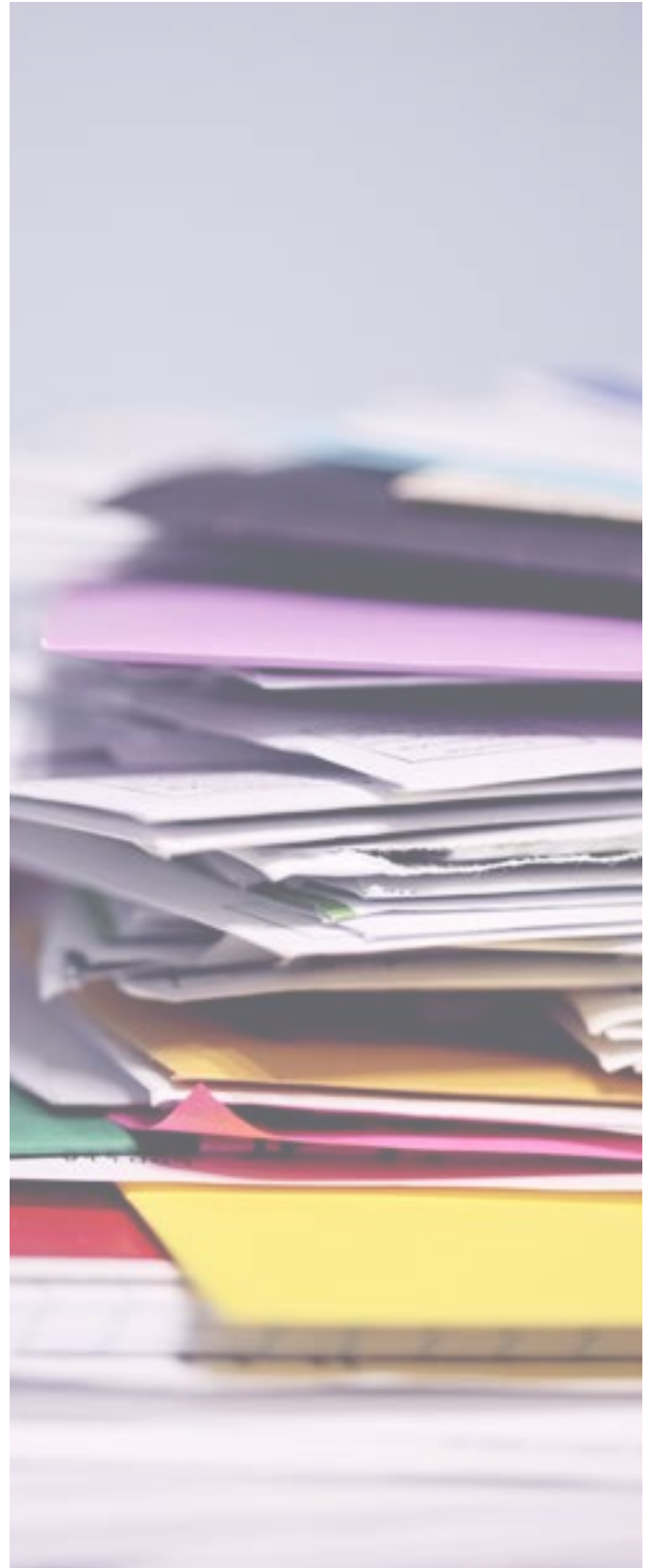
As well as helping you, this document can prove valuable to family and friends. If there's an emergency, they won't need to search through your paperwork to find the information they need. When you pass away, it can ensure your wishes are followed and relieve some of the pressure loved ones may feel while they're grieving.

This document can help you keep on top of everything, and can give you confidence that everything you or your family need is in a single place.

Some parts of this document are easy to fill in, but you may need to find paperwork to complete other sections or even spend some time thinking about what your wishes are. Don't feel that you have to complete the document in a single sitting, but make sure you come back to it to get the most out of it.

### **Do not include any sensitive information within this document**

While this document is designed to share information and make notes, do not share sensitive information such as your passwords, PINs, or account numbers.



## Personal details

The section of the document is designed to help you set out all the basic information you and others may need, as well as providing emergency contact details if needed.

<b>Title</b>	
<b>Forename(s)</b>	
<b>Last name</b>	
<b>Maiden name</b>	
<b>Date of birth</b>	
<b>Address</b>	
<b>Telephone number</b>	
<b>Mobile number</b>	
<b>Email address</b>	

## My health and medical details

Use this space to provide information on any health or medical conditions that may be important for people to know.

For example, details of any medication you are taking and where they are kept, allergies, and any other details that may be useful in an emergency. You may also want to note if you carry an organ donor card and where it is kept.

## Your partner or next of kin

<b>Title</b>	
<b>Forename(s)</b>	
<b>Last name</b>	
<b>Address</b>	
<b>Telephone number</b>	
<b>Mobile number</b>	
<b>Email address</b>	
<b>Relationship to you</b>	

## Your close family

Here you may want to include the details of your parents, children, or other close family members that should be contacted in case of an emergency.

<b>Title</b>				
<b>Forename(s)</b>				
<b>Last name</b>				
<b>Address</b>				
<b>Telephone number</b>				
<b>Mobile number</b>				
<b>Email address</b>				
<b>Relationship to you</b>				

**Your pets**

<b>Name</b>				
<b>Type/breed</b>				
<b>Chip number</b>				
<b>Name of vet</b>				
<b>Vet contact details</b>				
<b>Your wishes in case of emergency</b>				
<b>Special needs</b>				

Use this space to provide any additional information.

## Your friends

Use this space to note the details of your close friends. You may also want to provide details of your address book or contact list here or in the notes section of this document.

<b>Title</b>				
<b>Forename(s)</b>				
<b>Last name</b>				
<b>Address</b>				
<b>Telephone number</b>				
<b>Mobile number</b>				
<b>Email address</b>				

Use this space to provide any additional information.

## Life contacts

Providing details of organisations or professionals that you work with or employ can help a loved one to manage your affairs on your behalf in the case of an emergency. It also makes it easier for you to find the contact details when you need them.

### Employer

<b>Company name</b>	
<b>Contact name</b>	
<b>Address</b>	
<b>Telephone number</b>	
<b>Email address</b>	

## Health contacts

List here your registered GP and dentist. You may also want to include details of your pharmacist, care provider, or other types of health service that you use.

<b>Contact type</b>				
<b>Name</b>				
<b>Address</b>				
<b>Telephone number</b>				

Use this space to provide any additional information.

## Professional contacts

Here you may want to include the details for your solicitor, accounts, financial planner, or other businesses or individuals that deliver professional services for you.

Contact type				
Name				
Address				
Telephone number				

Use this space to provide any additional information.



## Household suppliers

Type	Supplier	Telephone number
Council Tax		
Electricity		
Gas		
Water		
Landline		
Internet		
Mobile phone		

## Household contacts

List here individuals or businesses that deliver household services, such as cleaning or home help, that your loved ones may need to contact if they are managing your affairs on your behalf.

Contact type				
Name				
Address				
Telephone number				

Use this space to provide any additional information.

## Organisations

From trade unions to sports clubs, include organisations that you are a part of here.

Contact type				
Name				
Address				
Telephone number				

Use this space to provide any additional information.

## Other important contacts

If there is anyone else your family or friends may need to contact on your behalf, write the details below.

## Important documents

Keeping track of legal documents and others that contain important information is important, but it can be easy to misplace them. Filling in this section can help you keep track of where important documents are and it can be valuable for your family if they need to manage your affairs.

Document	Location
Birth certificate	
Marriage or civil partnership certificate	
Property deeds	
Passport	
Driving licence	

Use this space to provide any additional information.

## Your will

Writing a will is the only way to ensure your wishes are carried out when you pass away. Your will sets out who you want to benefit from your estate, can name a guardian for dependents, and can also be used to state your preferred funeral arrangements, although this is not legally binding. It's important you write a will and that the executor – the person legally responsible for carrying out the wishes in your will – knows where it can be found.

<b>Location</b>	
<b>Executor</b>	

Use this space to provide any additional information.

## A Power of Attorney

A Power of Attorney allows someone to act on your behalf if you can no longer make decisions or don't want to. A Power of Attorney may be used following an accident or if you lose mental capacity. This document, when complete, can help guide your attorney when they're making decisions, so giving them a copy may be helpful.

There are different types of Power of Attorney depending on where you reside in the UK and when it was made.

<b>Location</b>	
<b>Attorney</b>	

Use this space to provide any additional information.

## Your finances

Providing financial details can be useful by pulling all the essentials together. It can make it easier to keep track of your arrangements and for loved ones to understand your financial situation too. Remember, **do not** share any sensitive information in this document.

### Current accounts and savings accounts

Here, list your financial accounts. This may include current accounts, savings accounts, ISAs, or National Savings & Investments.

Account type					
Provider					
Name in which the account is held					
Telephone number					

### Investments

If you hold investments, fill in the details below. This may include investments held in a Stocks and Shares ISA, fund, or individual stocks.

Type					
Provider					
Name in which the investment is held					
Telephone number					

Use this space to provide any additional information.

## Pensions

You may have several different types of pensions, including a State Pension, final salary pension, or defined contribution pension. Over your working life, you may accumulate several pensions, so it's important to keep track of the details for each one.

Type					
Provider					
Telephone number					

Use this space to provide any additional information.

## Credit and store cards

Type					
Issuer					
Telephone number					

## Mortgages

If you're paying a mortgage, whether on your main home, second property, or a buy-to-let property, provide the details below.

<b>Property</b>			
<b>Provider</b>			
<b>Telephone number</b>			

## Insurance policies

You're likely to hold several types of insurance policies, from home and buildings insurance to critical illness cover. Whether they are designed to pay out during your lifetime under certain conditions or after you pass away, like life insurance, it's important to keep track of the policies you hold.

<b>Type</b>			
<b>Provider</b>			
<b>Telephone number</b>			

## Notes

Use this space to cover any financial affairs that have not already been covered or to provide instructions to your loved ones.

## Possessions

In addition to your finances, your material possessions are important to keep track of, too. This could include property, vehicles, or items that have sentimental value to you.

### Property

<b>Address</b>			
<b>Other details: Is the property freehold or leasehold, for example, or is there a tenant in the property?</b>			

### Vehicles

<b>Make and model</b>			
<b>Registration number</b>			
<b>Location of vehicle documents</b>			
<b>Other details</b>			

### Other possessions

If you have other possessions that have significant value, whether monetary or sentimental, listing them here can provide peace of mind. You may want to provide details on where the items are kept and what you would like to happen to them.



## Your final wishes

### Funeral plan

A funeral plan allows you to plan and pay for your funeral during your lifetime. It means you can control what happens and that your loved ones won't need to make all the arrangements. How comprehensive funeral plans are can vary, so even if you have a funeral plan, you may still want to state your preference in the next section.

<b>Funeral plan provider</b>	
<b>Telephone number</b>	
<b>Location of documents</b>	

Use this space to make notes and provide any additional information.

## My wishes

If you have not arranged a funeral plan or there are aspects not included in the plan, providing your family and friends with guidance can support them and ensure your wishes are carried out. If you don't have a preference, saying so can help them make the necessary decisions.

<b>Have you left instructions/details of your final wishes elsewhere?</b>	<b>Yes</b>		<b>No</b>	
<b>If yes, where can they be found?</b>				
<b>Do you wish to be buried or cremated?</b>	<b>Buried</b>		<b>Cremated</b>	
<b>If you wish to be buried, have you arranged a burial plot?</b>	<b>Yes</b>		<b>No</b>	
<b>If not, do you have a preference where you are buried or have a preference for other details, such as the type of headstone?</b>				
<b>If you wish to be cremated, do you have a preference where you are cremated?</b>				
<b>What would you like to happen to your ashes?</b>				
<b>What type of coffin would you prefer?</b>				
<b>Where would you like your body to rest the night before the service?</b>				
<b>How would you like your body to be dressed?</b>				
<b>Do you have a preference about the route that is taken to the service?</b>				
<b>Do you have a preference for who will conduct your funeral?</b>				
<b>Have you made financial provisions for your funeral service?</b>				

## Further funeral details

Here you may like to include songs you want to be played at your funeral, family members or friends you'd like to take part in the funeral, or whether you'd like flowers. If you have preferences about what would happen after the funeral, such as a wake or memorial service, writing them down here can provide your loved ones with guidance.

## Notes

Use this space to write down anything that has not been covered in the document or share a message to those that may also use this document.

## What should I do with the document when it's complete?

Once you've completed this document, it's a good idea to print out several copies. Keep one close at hand in your home, so it's there when you need information. You should let loved ones that would deal with your affairs in the case of an emergency or when you pass away know where it's kept.

Giving someone you trust a copy can be useful too. This could be a family member or a professional, such as your financial planner or lawyer.

Don't just complete the document and forget about it either. Over time, your circumstances and wishes may change. You should make sure the guide is updated to reflect this. A quick annual review to make sure everything is in order can provide you with peace of mind.

If you'd like help organising your affairs and setting out an estate plan, please contact us.

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**Please note:** This document is for general information only and does not constitute advice. The information is aimed at retail clients only.

The Financial Conduct Authority does not regulate estate planning.

