

# When I'm gone **list**

A simple way to record your funeral wishes and  
your personal and financial details in one place.



# No one likes to think about death. But planning ahead and being prepared makes a big difference to those you leave behind.

One simple step you can take is to create a record of your personal and financial details. This will help your family or friends trace the important information they'll need when you die. It will also be useful for anyone who looks after your financial affairs while you're alive.

We've created this booklet for you so you have an easy place to write everything down.

- You don't have to fill it out – it's up to you whether you use it or not
- You can pick and choose which sections you complete
- Find a safe place to keep it, such as with your will, and let your family or close friends know about it
- Your details will change over time so think about updating it once a year or when your circumstances change

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.**

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## My personal details

Full name \_\_\_\_\_

Date and place of birth \_\_\_\_\_

Other names (for example, maiden name) \_\_\_\_\_

National Insurance number \_\_\_\_\_

National Health number \_\_\_\_\_

Tax Reference number \_\_\_\_\_

Passport number \_\_\_\_\_

Driving licence number \_\_\_\_\_

I am/am not an organ donor (delete as applicable)

## Next of kin or key contact

Full name \_\_\_\_\_

Relationship \_\_\_\_\_

Phone number \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Email address \_\_\_\_\_

### TIP

You can find your tax reference number on your payslip, P60 or correspondence from HMRC.

## 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 written a letter of wishes and it is kept \_\_\_\_\_

### My executors are:

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone number \_\_\_\_\_

Email address \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone number \_\_\_\_\_

Email address \_\_\_\_\_

## 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 number \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone number \_\_\_\_\_

## Other important documents and where I keep them

My birth certificate \_\_\_\_\_

Marriage certificate \_\_\_\_\_

Passport \_\_\_\_\_

Other \_\_\_\_\_

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## 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?
- 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?

**TIP** A will ensures your money and possessions go to the people you want them to. It also avoids any uncertainty, unnecessary expense and long legal delays that can occur if you don't write a will.



# My financial details

You can use this section to record all the different accounts and financial products you have. For security reasons, please don't write down your PIN, password details or account numbers here.

## 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 \_\_\_\_\_

**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 \_\_\_\_\_

Reference number \_\_\_\_\_

Where documents are kept \_\_\_\_\_

Company \_\_\_\_\_

Phone number \_\_\_\_\_

Reference number \_\_\_\_\_

Where documents are kept \_\_\_\_\_

## Life insurance

Life insurance company \_\_\_\_\_

Phone 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 certificate is kept \_\_\_\_\_

## Car breakdown cover

Provider number \_\_\_\_\_

Renewal date \_\_\_\_\_

Where documents are kept \_\_\_\_\_

## House insurance

Contents insurance \_\_\_\_\_

Policy number \_\_\_\_\_

Renewal date \_\_\_\_\_

Where documents are kept \_\_\_\_\_

Buildings insurance \_\_\_\_\_

Policy number \_\_\_\_\_

Renewal date \_\_\_\_\_

Where documents are kept \_\_\_\_\_

## Other insurance (pet/travel/boiler cover etc)

Provider name \_\_\_\_\_

Renewal date \_\_\_\_\_

Where documents are kept \_\_\_\_\_

Provider name \_\_\_\_\_

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 \_\_\_\_\_ 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 company is \_\_\_\_\_

My television provider is \_\_\_\_\_

My local council (for council tax) is \_\_\_\_\_

## Regular payments

**ORGANISATION**    **PAYMENT TYPE** (direct debit/standing order)

Charity donations \_\_\_\_\_

Club memberships \_\_\_\_\_

Subscriptions \_\_\_\_\_

Other \_\_\_\_\_

\_\_\_\_\_

## Significant possessions

### Property

Address \_\_\_\_\_  
\_\_\_\_\_

### Vehicles

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 number/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 site 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

Use the section below to make a note of what you've got.

## My digital accounts

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**TIP**

Some digital assets that you think of as belonging to you may not be yours to pass on. For example, digital music may only be licensed to you for use during your lifetime.

## 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's 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.

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“Talking about death and dying won't make it happen. But not talking about or not planning for it, can leave people worse off than they need to be.”

**Gary Rycroft** - Solicitor and media commentator  
on legal issues

