|  |  |
| --- | --- |
| **Household - name / contact details of utilities and suppliers** | **Action** |
| Electricity |  |
| Gas |  |
| Solar Panels |  |
| Water |  |
| Cable - TV/Sky/Broadband: |  |
| TV License |  |
| Milk and food delivery details |  |
| Newspaper delivery details |  |
| Refuse Collection Day: |  |

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| --- | --- |
| **Documents and Information - list where kept if appropriate to you** | **Action** |
| Birth Certificate  |  |
| Driving Licence Number/Expiry Date |  |
| Marriage Certificate  |  |
| Passport Number and Issue Date |  |
| Blue Badge |  |
| Computer Passwords |  |
| Holidays Booked / Holiday Insurance |  |
| House Deeds - location |  |
| Inventory of Possessions |  |
| Library to which book to be returned |  |
| Miscellaneous / Other – please add others as required |  |

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| --- | --- |
| **Legal – who, what documents, who holds paperwork or where stored** | **Action** |
| Next of Kin or preferred contact |  |
| Solicitor |  |
| Accountant |  |
| Executor of my estate |  |
| Enduring Power of Attorney (if signed before 2007) |  |
| Lasting Power of Attorney - Property & Financial Affairs |  |
| Lasting Power of Attorney - Health & Welfare |  |
| Last Will and Testament |  |
| Court of Protection – name of Guardian |  |
| Advance Care Plan |  |
| Advance Decision or Living Will |  |
| Advance Statement |  |
| Letter of Wishes |  |
| Funeral or Cremation Plans / Arrangements – also see Funeral Insurance |  |
| Maintenance of Property & Grounds until sale/distribution |  |
| Organ Donation |  |
| Post Office Redirection to Executors |  |

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| **Finance - list what applies to you** (some ideas shown below) | **Action** |
| Ready Cash e.g. what amount, where kept |  |
| Bank/Building Society Accounts |  |
| Savings Accounts |  |
| Stocks & Share / Bonds |  |
| Trusts/Discretionary Trusts / Deeds of Covenant |  |
| Debit / Credit Cards |  |
| Creditors |  |
| Debtors |  |
| Housing Benefit |  |
| Income - from employment |  |
| Income - from Re-mortgaging |  |
| Income - Other e.g. National Savings Certificates / Premium Bonds |  |
| Income - Other e.g. Overseas Income / Pensions |  |
| Income e.g. Benefits – what benefit, DWP / Benefits Office involved |  |
| Income e.g. Continuing Health Care (CHC) |  |
| Income e.g. Direct Debits |  |
| Income e.g. Pension / Pension Providers |  |
| Income Tax / Inland Revenue / HMRC |  |
| Legacies |  |
| Outgoings e.g. Endowment Policies |  |
| Outgoings e.g. Loan Finance |  |
| Outgoings e.g. Local Authority Council Tax |  |
| Outgoings e.g. Mortgage - Mortgage holder Name |  |
| Outgoings e.g. Rent  |  |
| Outgoings e.g. Standing Orders |  |
| Outgoings e.g. Subscriptions/Memberships |  |
|  |  |

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| --- | --- |
| **Insurances - list those relevant to you** | **Action** |
| Funeral Finances or Plan(Name of Policy if relevant) |  |
| Hospital Plans |  |
| Household/Buildings |  |
| Household/Contents |  |
| Household/Extra |  |
| Life Insurance (Name) |  |
| Medical Insurance |  |
| Vehicle Insurance |  |
|  |  |
|  |  |