When I’m Gone

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**

**Next of kin or key contact**

**Full name**

**Relationship**

**Phone number**

**Address**

**Email address**

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**My personal details**

**My important documents**

**Funeral wishes**

**My financial details**

**Useful contacts**

**Digital accounts**

**Arrangements for pets**

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**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 __________________________________________

Email address __________________________________________

Name __________________________________________

Address __________________________________________

Phone number __________________________________________

Email address __________________________________________
Other important documents and where I keep them

- My birth certificate
- Marriage certificate
- Passport
- Other

Write your funeral wishes here

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.

TIP - Think about leaving a list of friends and family you would like to be informed of your death. A simple list kept up to date with name, address and email/phone number can really help.
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

I claim a State Pension YES □ NO □

**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 documents are 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
Loans/hire purchase

Loan provider ____________________________________________

Phone number ____________________________________________

Where documents are kept ________________________________________

Loan provider ____________________________________________

Phone number ____________________________________________

Where documents are kept ________________________________________

State benefits

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

<table>
<thead>
<tr>
<th>ORGANISATION</th>
<th>PAYMENT TYPE (DIRECT DEBIT/STANDING ORDER)</th>
</tr>
</thead>
</table>

Charity donations ___________________________________________

Club memberships ___________________________________________

Subscriptions _____________________________________________

Other _____________________________________________________

TIP - You can use the Tell Us Once service to inform most government organisations of a death in one go.

TIP - You can use the Death Notification Service to notify a range of banks, building societies and other financial firms of a death in one step.
**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.

<table>
<thead>
<tr>
<th>NAME</th>
<th>PHONE NUMBER/EMAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solicitor</td>
<td>____________________</td>
</tr>
<tr>
<td>Accountant</td>
<td>____________________</td>
</tr>
<tr>
<td>Financial adviser</td>
<td>____________________</td>
</tr>
<tr>
<td>Doctor</td>
<td>____________________</td>
</tr>
<tr>
<td>Dentist</td>
<td>____________________</td>
</tr>
<tr>
<td>Optician</td>
<td>____________________</td>
</tr>
<tr>
<td>Organisations/societies</td>
<td>____________________</td>
</tr>
<tr>
<td>Neighbours (with keys)</td>
<td>____________________</td>
</tr>
</tbody>
</table>

**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**

______________________________________________________________

______________________________________________________________

______________________________________________________________

______________________________________________________________

______________________________________________________________

______________________________________________________________

______________________________________________________________

______________________________________________________________

______________________________________________________________

**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.
Talking about dying isn’t easy, but it matters. We know that planning for end of life has a positive impact on our wellbeing, and for those that are left behind. Getting there means having some important conversations and making careful decisions.

Sarah West
Director of Campaigns and Communications
Hospice UK and Dying Matters

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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