

Insurance Services



Your personal and financial details

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

[co-op.co.uk/insurance](https://www.co-op.co.uk/insurance)

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:

Full name _____

Address _____

Phone number _____

Email address _____

Full 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 _____

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.

Write your funeral wishes here

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 _____

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

Policy 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 _____

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

Charity donations Payment type

Name _____ Direct debit Standing order

Name _____ Direct debit Standing order

Club memberships

Name _____ Direct debit Standing order

Name _____ Direct debit Standing order

Subscriptions

Name _____ Direct debit Standing order

Name _____ Direct debit Standing order

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.

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

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.

“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 - Chair of the Dying Matters Forum

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