



Financial Planning

# MY IMPORTANT INFORMATION

## A SIMPLE WAY TO RECORD YOUR FUNERAL WISHES, PERSONAL & FINANCIAL DETAILS IN ONE PLACE

No one likes to think about death. However 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 will need when you die.

It will also be useful for anyone who looks after your financial affairs while you are alive. We have created this booklet for you so you have an easy place to write everything down.

- You do not have to fill it out – it is 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
- Let your family or close friends know about it
- Your details will change over time so think about updating it once a year

[www.hsp-ifa.com](http://www.hsp-ifa.com)

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.**

My personal details	Page 3
My important documents	Page 4
My funeral wishes	Page 7
My financial details	Page 9
Useful contacts	Page 18
Digital accounts	Page 19
Important arrangements	Page 21
Any additional notes	Page 22

# MY PERSONAL DETAILS

## PERSONAL DETAILS

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## NEXT OF KIN OR KEY CONTACT

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# 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 \_\_\_\_\_

## EXECUTORS

**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 SOLICITORS ARE:**

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

## OTHER IMPORTANT DOCUMENTS AND WHERE I KEEP THEM

Birth certificate

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Marriage certificate

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Passport

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Others

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## ANYTHING ELSE

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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.

# YOUR FUNERAL WISHES

## FUNERAL WISHES

Thinking through and talking to your loved ones about how you would like your funeral to be – and what you do not want - will take away a lot of worry and uncertainty for them.

***Writing down your wishes means they will have something to reassure them they are 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 are to be buried, where you would like this to be (and details of any plot you have purchased).
- If you are to be cremated, where this should be and what you would like to happen to your ashes.
- What music, prayers and readings you would like.
- Would you like people to wear black or not?
- Who you would like to be invited
- If there is anyone you would particularly like to speak at your funeral.
- Would you want flowers or donations and if so, which charities should these go to?
- Where you would like any post-funeral gathering to be.
- Would you like a memorial and what should it be?

*Page 7*



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 do not 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

Bank/building society

Name(s) in which account is held

## MORTGAGE:

Bank/building society

Name(s) in which account is held



## CREDIT, DEBIT AND STORE CARDS

Issuer name

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Card number

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Issuer name

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Card number

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Issuer name

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Card number

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## PENSIONS

*(This could include a final salary pension from an employer, schemes you joined through your employer and pension schemes you have set up yourself)*

Company

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Phone number

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Reference number

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Where documents are kept

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Company

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Phone number

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Reference number

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Where documents are kept

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Company

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Phone number

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Reference number

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Where documents are kept

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**LIFE INSURANCE**

Life insurance company

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Phone number

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Where documents are kept

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Life insurance company

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Phone number

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Where documents are kept

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**ANNUITY POLICIES**

**Provider name**

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Policy number

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Where documents are kept

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**Provider name**

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Policy number

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Where documents are kept

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**Provider name**

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Policy number

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Where documents are kept

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**ANNUITY POLICIES**

**Provider name**

Policy number

Where documents are kept

**Provider name**

Policy number

Where documents are kept

**INVESTMENTS**

**Provider name**

Name(s) in which account is held

Phone number

Provider name

Name(s) in which account is held

Phone number

**SHARES**

**Company name**

Where certificate is kept

**Company name**

Where certificate is kept

**Company name**

Where certificate is kept

# HOUSEHOLD & DOMESTIC DETAILS

## CAR

Ownership

Rental or Leased (from whom)

Rental or Lease Company

Name(s) in which account is held

Where documents are 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**

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Provider name

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Policy number

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Renewal date

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Where documents are kept

**Buildings insurance**

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Provider name

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Policy number

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Renewal date

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Where documents are kept

**OTHER INSURANCES (Pet, Travel, Boiler, etc.)****Type**

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Policy number

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Renewal date

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Where documents are kept

**Type**

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Policy number

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Renewal date

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Where documents are kept

**Type**

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Policy number

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Renewal date

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Where documents are kept

**LOANS OR HIRE PURCHASE****Type or Item**

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Loan Provider

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Policy number

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Phone number

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Where documents are kept

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**Type or Item**

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Loan Provider

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Policy number

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Phone number

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Where documents are kept

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**BENEFITS OR ENTITLEMENTS****Name of benefit**

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Where documents are kept

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**Name of benefit**

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Where documents are kept

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**Name of benefit**

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Where documents are kept

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**PROPERTY RENTAL AGREEMENT**

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Landlord's name

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Landlord's contact details

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# 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(s)



OTHER SIGNIFICANT POSSESSIONS / VALUABLES

Description

Value

Where kept

Description

Value

Where kept

Description

Value

Where kept

Description

Value

Where kept

Description

Value

Where kept

Description

Value

Where kept

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

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Accountant

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Financial adviser

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Doctor

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Dentist

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Optician

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Organisations /societies

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Neighbours (with keys)

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# 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 have got?

Having a list will remove the guesswork for them.

Your list might include any of the following:

- Social media accounts (Facebook, Twitter, Linked In)
- Email accounts
- Online financial accounts
- Online auction site accounts (e Bay, 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 over to make a note of what you have got.*



**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.





# IMPORTANT ARRANGEMENTS

## CHILDREN

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If you have children who are still minors (under 16 in Scotland or under 18 in the rest of the UK) it is 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.

## PETS

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If you have pets, use the space below to make a note of what arrangements you would like to be made for them.

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## Financial Planning

*“Talking about death and dying will not 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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