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Personal Affairs Checklist

What is the Personal Affairs Checklist?

The Personal Affairs Checklist (PAC) is a document produced to help you keep a concise record of your personal affairs and papers. Investing a little time now to complete the PAC could save your spouse, partner, relatives or friends a great deal of time and expense in the future.

Who is the PAC for?

The PAC is for everybody. It is organised in three sections.

- **Section 1** gives information e.g. key advisers, location of your will etc, which might be needed quickly.
- **Section 2** covers your financial affairs: bank accounts, insurance policies, other assets.
- **Section 3** covers other general information e.g. employment record, membership of clubs, etc.

The form is designed to meet many needs. You need only fill in those parts that are relevant to you.

What do I do with the completed PAC?

The completed form will contain confidential information which should not be left lying around. We recommend that either:

1. If you have your own safe, lock it away there. Consider though, taking a photocopy of your PAC and the relevant documents to lodge with someone you trust.
2. If you do not have your own safe, you can keep the form somewhere secure at home, but maybe consider your bank or with your accountant or solicitor.
3. You give the form to someone you trust to hold in a safe place for you.

What is the difference between the PAC and my Will?

The PAC is not a will and should not contain instructions about what should be done with your money or possessions. It is a record of where your key personal records, assets and papers can be located.

Name

Address

Date Completed

PAC held at

Section 1

Advisers

Accountant

Name

Address

Telephone

Solicitor

Name

Address

Telephone

Doctor

Name

Address

Telephone

IFA

Name

Address

Telephone

Other Advisers

Name

Address

Telephone

Nature of Advice

Name

Address

Telephone

Nature of Advice

Name

Address

Telephone

Nature of Advice

Name

Address

Telephone

Nature of Advice

In the event of my death or incapacity due to illness please contact:

Name

Address

Relationship

Telephone

Mobile

Name

Address

Relationship

Telephone

Mobile

My Will

The original of my Will is located

The Will is dated

The Will is drawn up by

Address

The Executors are :- Name

Address

1.

2.

3.

Funeral Arrangements (Note any preferences)

'Living Will' declaration to family and doctors may be found

Power of Attorney for me is held by

Medical Research Bequests/Donor Card may be found (eyes, kidneys, etc)

My deed/safe box may be found

The key/password can be found in a sealed envelope, cross-signed by me, held at

The access codes to my computer are to be found in a sealed envelope, cross-signed by me, held at

Section 2

Account(s) - (Banks, Building Society, etc)

I have [] (number) accounts held at the institution(s) indicated below:

Name of Institution	_____	Name of Institution	_____
Address	_____	Address	_____
_____	_____	_____	_____
Telephone	_____	Telephone	_____
Account No	_____	Account No	_____
_____	_____	_____	_____
Name of Institution	_____	Name of Institution	_____
Address	_____	Address	_____
_____	_____	_____	_____
Telephone	_____	Telephone	_____
Account No	_____	Account No	_____
_____	_____	_____	_____

Investments (eg shares, unit trusts, premium bonds, national savings certificates, etc)

Type	_____	May be found	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Credit Cards

Type of Card	_____	Credit Card No	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Pensions

Name of Company	_____	Pension Reference	_____	Contact Details	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Main Residence

Address

Joint Owner (Name & Address)

Telephone

Location of Deeds

Mortgage Lender (Name & Address)

Account Number

Other Properties

Address

Joint Owner (Name & Address)

Telephone

Location of Deeds

Mortgage Lender (Name & Address)

Account Number

Insurance Policies eg Life, Car, Home, Health

Policy type

Policy Number

Name & Address of Insurance Company

Telephone

May be Found

Policy type

Policy Number

Name & Address of Insurance Company

Telephone

May be Found

Policy type

Policy Number

Name & Address of Insurance Company

Phone:

May be Found

Policy type

Policy Number

Name & Address of Insurance Company

Telephone

May be Found

Policy type

Policy Number

Name & Address of Insurance Company

Telephone

May be Found

Policy type

Policy Number

Name & Address of Insurance Company

Phone:

May be Found

Section 3

My Birth/Marriage Certificates may be found

Other documents relating to marriage may be found

Details of employment

Company Name

Address

Employment Reference

Telephone

Please contact

I am/am not a member of a company pension scheme

National Insurance number

Company Name

Address

Employment Reference

Telephone

Please contact

I am/am not a member of a company pension scheme

National Insurance number

Directorships

Company Names

Taxation - The tax office which deals with my affairs is:

Address

Telephone:

My Tax Reference number

Tax Advisers (if any)

Associations, Clubs and Societies (eg Charitable Societies, Trade Associations, Sports Clubs, Trade Union, Professional Bodies)

Association	Association
Address	Address
Contact	Contact

Jewellery/Other assets - details may be found

Other Details (Not covered by any section above)

Provided by **shapcotts** chartered accountants & business advisors

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