



Instructions for my next-of-kin and executors upon my death (August 2005)

This form is not a will. It does not deal with what should happen to your property or savings. Even if you own very little, we would advise you to make a will, otherwise your possessions will be distributed according to legal regulations rather than your own wishes.

The purpose of this form is to give instructions to a member of your family, a trusted friend or executor upon your death. You only need to fill in the sections that apply to you. After completing it, pass it on to the relevant person to store in a safe and secure place, because it will contain confidential details that could help people to access your property.

PERSONAL INFORMATION

My name _____

My address _____

Postcode _____ Tel no _____

Occupation _____

Date of birth _____ Place of birth _____

Name of spouse/late spouse/partner (delete whichever does not apply)

WHERE TO FIND MY WILL (If you don't have a will, contact your solicitor for help)

The location of my will is _____

The date of my latest will is _____

NOTE: The will may contain important information about funeral arrangements

MEDICAL INFORMATION

My NHS number is _____

The location of my medical card is _____

Doctor's name _____

Doctor's address _____

Postcode _____ Tel no _____

BEFORE THE FUNERAL

Contact for the person you would like to make arrangements (for example: registering the death and contacting the funeral director)

Name _____

Address _____

Postcode _____ Tel no _____

PEOPLE TO CONTACT FOLLOWING MY DEATH

1. Relatives and friends

Name _____

Address _____

Postcode _____ Tel no. _____

Name _____

Address _____

Postcode _____ Tel no. _____

Name _____

Address _____

Postcode _____ Tel no. _____

2. My Solicitor

Company name _____

Address _____

Postcode _____ Tel no. _____

3. Registrar of Births, Marriage and Deaths

Address _____

Postcode _____ Tel no. _____

Note: Ask for two copies of the Death Certificate in order to claim assets. A death may be registered at any local registration office, but this may delay matters as the papers will need to be sent to the area in which the death occurred.

PEOPLE TO CONTACT FOLLOWING MY DEATH

4. Employer

Person to contact _____

Name and address of organisation _____

Postcode _____ Tel no. _____

5. Financial contacts

Bank

Name & Address _____

Postcode _____ Tel no. _____

Details of accounts:

1. Account Type & No _____

2. Account Type & No _____

Items in safe custody _____

Accountant

Person to contact _____

Name and address of company _____

Postcode _____ Tel no. _____

Tax Adviser

Person to contact _____

Name and address of company _____

Postcode _____ Tel no. _____

Insurance companies/broker

Type of insurance policy _____

Name and address of company _____

Postcode _____ Tel no. _____

Type of insurance policy _____

Name and address of company _____

Postcode _____ Tel no. _____

FUNERAL ARRANGEMENTS

Instructions about leaving your body for medical research or for transplants, etc. Enquiries should be made to either HM Inspector of Anatomy (for details of Medical Schools) Tel: 020 7972 4551 or 4342. Website: www.doh.gov.uk/hmia

I wish to donate the following organs _____

My donor card can be found in _____

I have a pre-paid funeral plan. On my death please contact:

Company name _____

Address _____

Postcode _____ Tel no. _____

I do not have a pre-paid funeral plan and on my death would like the following funeral director to be used:

Company name _____

Address _____

Postcode _____ Tel no. _____

Type of funeral ceremony to be performed (delete as appropriate)

My religion is _____

Person to conduct the service: Name _____

Address _____

Postcode _____ Tel no. _____

Directions about the ceremony (for example music, readings, etc)

The ceremony is to be private (close relatives and friends only) YES/NO

I wish to be cremated/buried (delete as appropriate) Directions about my ashes (if cremated) _____

I hold a Grant of Exclusive Rights of Burial issued by:

Council _____ In respect of grave no _____

Section _____ Burial ground/cemetery _____

I wish to be buried in the above grave YES/NO (delete as appropriate)

On my death the above grave grant should pass to

Name _____

I would like the following memorials (inscription, etc)

Are flowers to be sent YES/NO (delete as appropriate)

Instead of flowers, please send any donations to the following charity/charities:

INSTRUCTIONS FOR AFTER THE FUNERAL

The executor of my estate should carry out the following instructions

- A) **(If appropriate, notify the solicitor listed on page 3 of this form to wind up my estate. Instructions B to F below will not normally apply where a solicitor has been instructed to wind up the estate).** Note: The executor may wish to wind up the estate without the assistance of a solicitor.

B) Ask for forms for Grant of Probate/Letters of Administration from the Probate Registrar. Telephone 0845 30 20 900 Probate and IHT helpline (for England, Wales and Northern Ireland);
0845 234 1000 (Scotland for forms of confirmation) (both local rate calls).
Website: www.hmrc.gov.uk

C) Make the relevant claims resulting from any insurance policies held (Note: details of insurance policies and insurance companies listed on page 4)

D) Inform the Inspector of Taxes

Address _____

Postcode _____ Reference number _____

E) Inform Social Security Office (for example, Pension Service)

Address _____

Postcode _____ Reference number _____

F) Check if dependants are entitled to any benefits (Note: Age Concern publishes a number of Factsheets which include details of benefits – for contact details see page 8).

G) Ask my employer if death-in-service benefit or widows/widowers pension is payable.

H) If necessary, notify the following companies (for example gas, electricity, water, telephone suppliers):

Name & Tel No _____

Name & Tel No _____

Name & Tel No _____

Council tax/rent departments

Address & Tel No _____

INSTRUCTIONS FOR AFTER THE FUNERAL continued

I) Other services to contact (for example newsagent, milkman)

J) Other instructions (Remember this is not a will – do not leave instructions on this form about what you wish to be done with your money and possessions. Age Concern produces a factsheet about making a will – contact details on page 8).

WHERE TO FIND THINGS

House keys (including spare sets) _____

Birth certificate _____ Marriage certificate _____

Passport/identity cards _____

Insurance policies _____

Stocks/shares certificates _____

Deeds of house _____

Lease of property _____

Bank/Building society/PO savings books _____

Rent book _____

Bank/Credit cards _____

Premium Bond certificates _____

Pension documents _____

Income tax papers _____

Car keys _____

Log book and insurance certificates _____

Computer details (for example, password, email addresses, company support desk)

Mobile phone details (for example, supplier, contract, number)

WHERE TO FIND DOCUMENTS ON MY LIABILITIES

Loans: _____

Mortgages: _____

Hire purchase agreements: _____

Credit agreements: _____

Other liabilities: _____

Note: When administering an estate some liabilities may take preference over others. If in doubt, seek legal advice

FURTHER INFORMATION

Please use this space to continue entries from earlier sections, or to provide information not previously covered.

AGE CONCERN FACTSHEETS AND BOOKS

If you would like a full list of factsheets and a book catalogue

Phone 0800 00 99 66 (free call) or write to Age Concern Freepost (SWB 30345), Ashburton, Devon TQ13 7ZZ.

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