



# 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

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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.

# WHAT'S INSIDE

---

**04** My personal details

---

**05** My important documents

---

**08** Funeral wishes

---

**10** My financial details

---

**17** Useful contacts

---

**18** Digital accounts

---

**19** Dependants

---

“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



## My personal details

04

Full name \_\_\_\_\_

Date and place of birth \_\_\_\_\_

Other names (eg maiden name) \_\_\_\_\_

National Insurance No. \_\_\_\_\_

National Health No. \_\_\_\_\_

Tax Reference No. \_\_\_\_\_



You can find your tax reference number on your payslip, P60 or correspondence from HMRC.

Driving licence No. \_\_\_\_\_

I'm an organ donor    **YES**     **NO**

## Next of kin or key contact

Full name \_\_\_\_\_

Relationship \_\_\_\_\_

Phone No. \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Email \_\_\_\_\_



## My important documents

05

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's kept* \_\_\_\_\_

*My most recent will is dated* \_\_\_\_\_

*I have written a letter of wishes and it's kept* \_\_\_\_\_

### My executors are:

*Name* \_\_\_\_\_

*Address* \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*Phone No.* \_\_\_\_\_

*Email* \_\_\_\_\_

*Name* \_\_\_\_\_

*Address* \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*Phone No.* \_\_\_\_\_

*Email* \_\_\_\_\_

## Funeral plan

06

I have a funeral plan with \_\_\_\_\_

My funeral plan documents are kept \_\_\_\_\_

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## Power of attorney

I have a power of attorney    **YES**     **NO**

It's dated \_\_\_\_\_

It's registered with the Office of the Public Guardian    **YES**     **NO**

### My attorneys are:

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone No. \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone No. \_\_\_\_\_

# Other important documents and where I keep them

My birth certificate \_\_\_\_\_

My marriage certificate \_\_\_\_\_

My passport \_\_\_\_\_

Other \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



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



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?



**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.**







## My financial details

10

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

11

Issuer name \_\_\_\_\_

Card No. \_\_\_\_\_

Issuer name \_\_\_\_\_

Card No. \_\_\_\_\_

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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've set up yourself)*

Company \_\_\_\_\_

Phone No. \_\_\_\_\_

Reference No. \_\_\_\_\_

Where documents are kept \_\_\_\_\_

Company \_\_\_\_\_

Phone No. \_\_\_\_\_

Reference No. \_\_\_\_\_

Where documents are kept \_\_\_\_\_

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## Life insurance

Company \_\_\_\_\_

Phone No. \_\_\_\_\_

Where documents are kept \_\_\_\_\_

## **Annuity policy**

12

Provider name \_\_\_\_\_

Policy No. \_\_\_\_\_

Where documents are kept \_\_\_\_\_

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## **Investments**

Provider name \_\_\_\_\_

Name(s) in which account is held \_\_\_\_\_

Phone No. \_\_\_\_\_

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## **Shares**

Company name \_\_\_\_\_

Where certificate is kept \_\_\_\_\_

Company name \_\_\_\_\_

Where certificate is kept \_\_\_\_\_

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## **Car insurance**

Car insurance company \_\_\_\_\_

Policy No. \_\_\_\_\_ Renewal date \_\_\_\_\_

Where documents are kept \_\_\_\_\_

## Car breakdown cover

13

Provider No. \_\_\_\_\_ Renewal date \_\_\_\_\_

Where documents are kept \_\_\_\_\_

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## House insurance

### Contents insurance:

Policy No. \_\_\_\_\_ Renewal date \_\_\_\_\_

Where documents are kept \_\_\_\_\_

### Buildings insurance:

Policy No. \_\_\_\_\_ Renewal date \_\_\_\_\_

Where documents are kept \_\_\_\_\_

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## Other insurance *(pet/travel/boiler cover etc)*

Provider Name \_\_\_\_\_ Renewal date \_\_\_\_\_

Where documents are kept \_\_\_\_\_

Provider Name \_\_\_\_\_ Renewal date \_\_\_\_\_

Where documents are kept \_\_\_\_\_



Please don't write security information about your accounts such as passwords or PIN numbers in this document.

## Loans/hire purchase

14

Loan provider \_\_\_\_\_

Phone No. \_\_\_\_\_

Where documents are kept \_\_\_\_\_

Loan provider \_\_\_\_\_

Phone No. \_\_\_\_\_

Where documents are kept \_\_\_\_\_

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## Benefits/entitlements

Name of benefit \_\_\_\_\_

Name of benefit \_\_\_\_\_

Name of benefit \_\_\_\_\_

Name of benefit \_\_\_\_\_

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## Rental agreement

Landlord's name \_\_\_\_\_

Landlord's contact details \_\_\_\_\_

## Utility providers

15

Gas provider \_\_\_\_\_

Electricity provider \_\_\_\_\_

Water company \_\_\_\_\_

Broadband provider \_\_\_\_\_

Phone company \_\_\_\_\_

Mobile phone company \_\_\_\_\_

Television provider \_\_\_\_\_

Local council (council tax) \_\_\_\_\_

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## Regular payments *(charity donations, club memberships, subscriptions etc)*

Organisation \_\_\_\_\_ Payment type \_\_\_\_\_

Organisation \_\_\_\_\_ Payment type \_\_\_\_\_

Organisation \_\_\_\_\_ Payment type \_\_\_\_\_

Organisation \_\_\_\_\_ Payment type \_\_\_\_\_

Organisation \_\_\_\_\_ Payment type \_\_\_\_\_

Organisation \_\_\_\_\_ Payment type \_\_\_\_\_

**Property**

*Address* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Vehicles**

*Registration No.* \_\_\_\_\_

**Other significant possessions/valuables**

*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.

*Solicitor* \_\_\_\_\_

*Phone No./email* \_\_\_\_\_

*Accountant* \_\_\_\_\_

*Phone No./email* \_\_\_\_\_

*Financial adviser* \_\_\_\_\_

*Phone No./email* \_\_\_\_\_

*Doctor* \_\_\_\_\_

*Phone No./email* \_\_\_\_\_

*Dentist* \_\_\_\_\_

*Phone No./email* \_\_\_\_\_

*Optician* \_\_\_\_\_

*Phone No./email* \_\_\_\_\_

*Organisations/societies* \_\_\_\_\_

*Phone No./email* \_\_\_\_\_

*Neighbours (with keys)* \_\_\_\_\_

*Phone No./email* \_\_\_\_\_



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

- Social media accounts (eg Facebook, Twitter, LinkedIn)
- Email accounts
- Online financial accounts
- Online auction site accounts (eg 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

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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.





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