

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 which might be needed quickly; key advisers, the location of your will, access to internet accounts etc.
- Section 2 covers your financial affairs: assets, insurance policies, investment, pensions, mortgages and other liabilities.
- Section 3 covers other general information like your employment record, club memberships etc.

The form is designed to cover just about everyone but you need only complete those parts that are relevant to you. If you are self employed, you may wish to separately document key aspects of your business.

What do I do with the completed PAC?

We recommend that a copy of the form is deposited with a trusted friend or relative, or your bank, accountant or solicitor. A copy would in an case be kept with your Will. As some of the information will change from time to time, it is desirable that the PAC is kept up to date.

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 assets. It is a record of your key personal records, assets and papers are and where they are kept.

Contents overview

Section 1

My details
Next of Kin
My Will
Practical arrangements
Advisers
Other Advisers

Section 2

Bank and Building Society Accounts
Other Bank Accounts
Investments
Credit Cards
Insurance Policies
Pensions
Property - Main Residence
Other Real Estate
Official Documents

Section 3

Details of employment
Directorships
Interests in Family Companies
Trusts of which I am a beneficiary
Taxation
Associations, clubs & societies
Digital Information
Other assets
Other details

Section 1

My details	
Name	
Address	
Email Address	
Date Completed	
PAC held at	

Next of Kin:	In the event of my death or incapacity due to illness contact:
Name	
Relationship	
Address	
Email Address	
Telephone No.	
Name	
Relationship	
Address	
Email Address	
Telephone No.	

My Will	
The original of my Will is located	
The Will is dated	
It is drawn up by	
Address	
The Executors are	

Practical arrangements	
Preferences for Funeral arrangements	
Details of 'Living Will' declaration to family and doctors	
Wishes regarding care of dependent children	
Wishes regarding care of pets	
Power of Attorney for me is held by	
Power of Attorney is	<input type="checkbox"/> Enduring <input type="checkbox"/> Lasting <input type="checkbox"/> Ordinary
Details of Medical Research Bequests and preferences about organ donation	
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	

Advisers	
Accountant	
Address	
Telephone No.	
Solicitor	
Address	
Telephone No.	
IFA	
Address	
Telephone No.	
Stockbroker	

Address	
Telephone No.	
Doctor	
Address	
Telephone No.	
Other Advisers (e.g. Dentist)	
Name	
Address	
Telephone No.	
Name	
Address	
Telephone No.	

Section 2

Bank Accounts - list details of any bank or building society here

Remember to include the following details:

1. Name, address and telephone number of the bank/building society
2. Names of account holders for each account
3. Account number and sort code for each account

Investments - list details of any stocks and shares, unit trusts, premium bonds and national savings certificates here.

Credit Cards - list details of credit cards here.

Remember to include the following details:

1. Issuer and Type of Card
2. Credit Card Number

Insurance Policies - list details of any Life, car, buildings, contents, health and travel policies here

Remember to include the following details:

1. Policy Type and Number
2. Name, address and telephone number of insurance company
3. Where to find any policy documents

Details of any other Real Estate	

Official Documents	
My Birth Certificate may be found	
National Insurance Number	
My driving licence may be found	
Driving licence number	
My passport may be found	
Passport number	
My marriage/civil partnership certificate may be found	
Other documents relating to marriage/civil partnership may be found	

Section 3

Details of employment	
Company Name 1	
Address	
Employment Reference	
Telephone	
Please contact	
Company Name 2	
Address	
Employment Reference	
Telephone	
Please contact	

Directorships - list company names and details

Interests in family companies- list details here

Trusts of which I am a beneficiary- list details here

Taxation	
Tax office address	
Tax office phone number:	
Tax reference number:	
Name and contact info for your tax adviser	

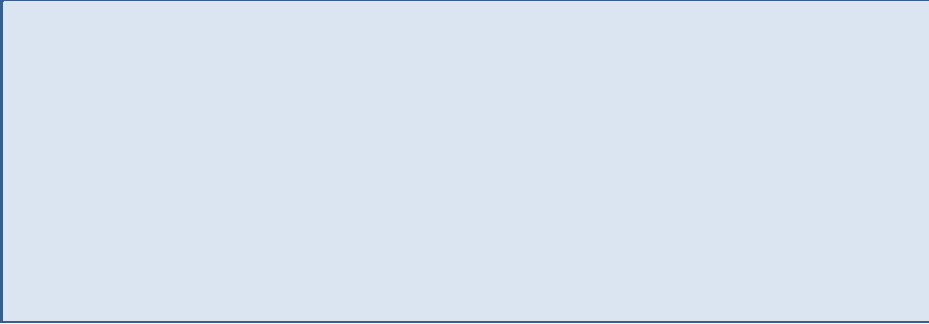
Other Organisations - list details of any Charitable Organisations, Trade Associations, Sports Clubs, Trades Union or Professional Bodies you are involved in
Remember to include the following information:

1. Organisation name
2. Address and telephone number
3. Who to contact

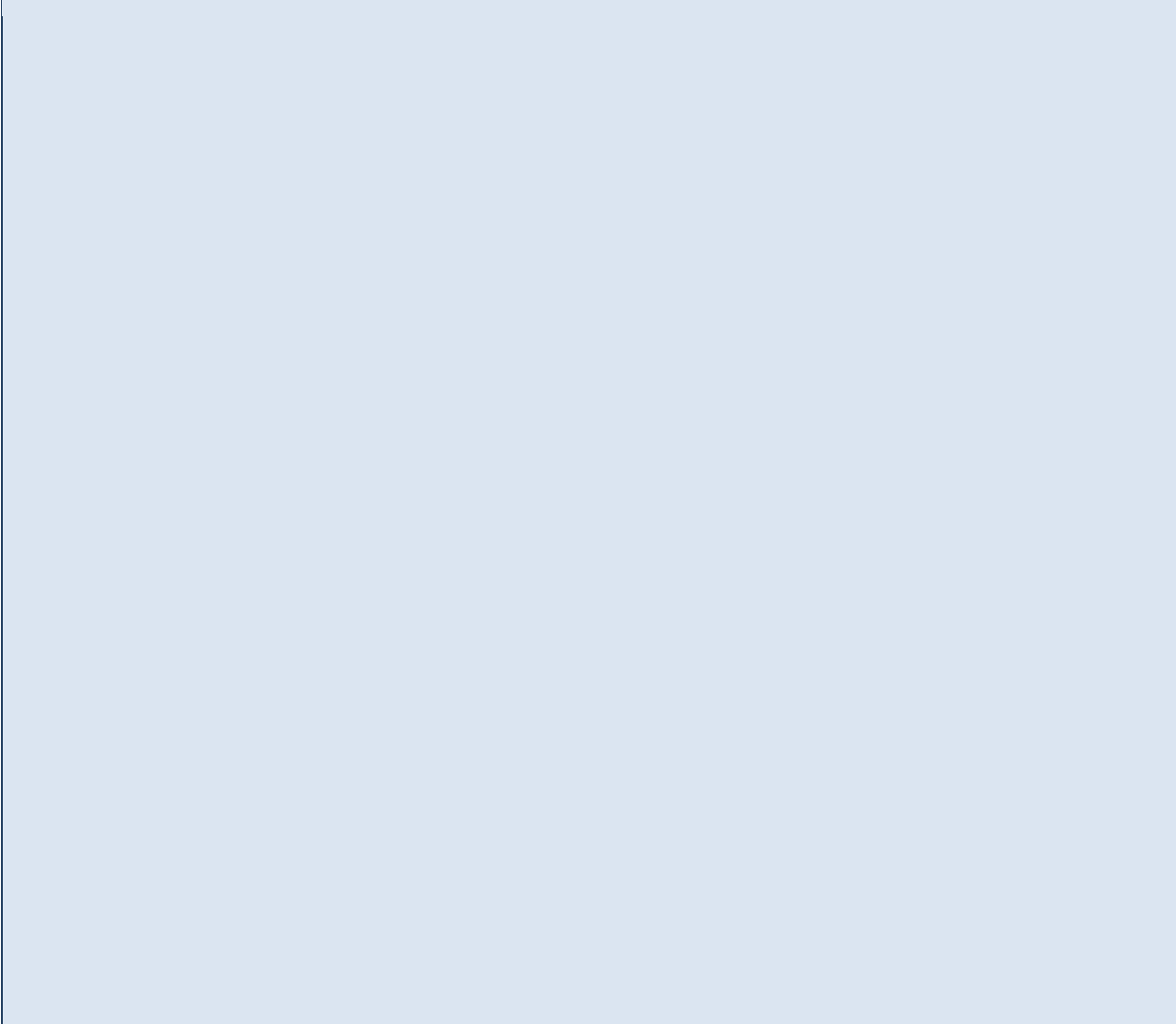
Digital Information	
Details of Facebook account	
Details of Twitter account	
Details of LinkedIn membership	
Personal website address	

Digital Information continued ...

More information



Other assets (Jewellery, wine, art)



Other Details