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.

To complete the form you just need to tab or click through the document and type over the grey boxes. Then save or print the completed form.

Each field will stretch to contain as much or as little detail as you would like to enter, so there should be no need for you to have to use additional paper to record all your information.

### 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 and where they are kept.

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# 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 |  |  |  |
| 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 |
|  |

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

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| --- |
| Credit Cards - list details of credit cards here. Remember to include the following details:   1. Issuer and Type of Card 2. Credit Card Number |
|  |

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| **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 |
|  |

|  |  |
| --- | --- |
| **Pensions** - list details. (If pension is a final salary pension, give details of employer. If pension is a money-purchase scheme, give details of the scheme administrator and all reference numbers) | |
| **1)** |  |
|  |
| **2)** |  |
|  |
| **3)** |  |
|  |
| **4)** |  |
|  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Main Residence | | | | |
| Address |  | | | |
| If you own the property what is the type of ownership? |  |  | |  |
| If the property is jointly owned, give details of co-owner(s) |  | | | |
| The property is |  | |  | |
| Location of Deeds |  | | | |
| Details of Mortgage Lender |  | | | |
| Account Number |  | | | |
| Details of Management company (if relevant) |  | | | |
| Details of landlord if property is rented |  | | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Other Real Estate | | | | |
| Description |  | | | |
| Address |  | | | |
| If you own the property what is the type of ownership? |  |  | |  |
| If the property is jointly owned, give details of co-owner(s) |  | | | |
| The property is |  | |  | |
| Details of Mortgage Lender |  | | | |
| Account Number |  | | | |
| Details of Management company (if relevant) |  | | | |
| Details of landlord if property is rented |  | | | |
|  |  | | | |
| Description |  | | | |
| Address |  | | | |
| If you own the property what is the type of ownership? |  |  | |  |  |
| If the property is jointly owned, give details of co-owner(s) |  | | | |
| The property is |  | |  | |
| Details of Mortgage Lender |  | | | |
| Account Number |  | | | |
| Details of Management company (if relevant) |  | | | |
| Details of landlord if property is rented |  | | | |

|  |
| --- |
| 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 |
|  |

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| --- |
| Interests in family companies- list details here |
|  |

|  |
| --- |
| Trusts of which I am a beneficiary- list details here |
|  |

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| --- | --- |
| 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 |  |
| More information |  |

|  |  |
| --- | --- |
| Other assets | (Jewellery, wine, art) |
|  | |

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| --- |
| **Other Details** |
|  |