



Instructions for my next-of-kin and executors upon my death (July 2008)

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. For information about making a will, see Age Concern's Factsheet 7.

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. You may need to update the information from time to time, to make sure it is still relevant.

PERSONAL INFORMATION

My name _____

My address _____

Postcode _____ Tel no _____

Occupation _____

Date of birth _____ Place of birth _____

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

WHERE TO FIND MY WILL (If you don't have a will, contact a solicitor for help. To obtain the Age Concern factsheet about making a will, see contact details on page 12)

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

Firm name

Address

Postcode _____ Tel no. _____

3. Registrar of Births, Marriage and Deaths – Local Register Office

Address

Postcode _____ Tel no. _____

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

PEOPLE TO CONTACT FOLLOWING MY DEATH

4. Employer

Person to contact

Name and address of organisation

Postcode _____ Tel no. _____

5. Financial contacts (For security reasons, do not write down PIN numbers or account numbers)

Bank

Name & Address

Postcode _____ Tel no. _____

Details of accounts:

1. Account Type

Name in which account is held

2. Account Type

Name in which account is held

Items in safe custody

Building Society

Name & Address

Postcode _____ Tel no. _____

Details of accounts:

1. Account Type

Name in which account is held

2. Account Type

Name in which account is held

Other Financial Institutions where accounts held (e.g. Mortgage, ISA, Pensions, Premium Bonds, Credit Cards, Store Cards, Shares. Add extra pages if needed):

1. Type of account

Name and address of company

Postcode _____ Tel no. _____

2. Type of account

Name and address of company

Postcode _____ Tel no. _____

3. Type of account

Name and address of company

Postcode _____ Tel no. _____

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 the Human Tissue Agency Tel: 020 7211 3400. Website: www.hta.gov.uk

I wish to donate my body to medical science Yes / No

If yes, a copy of my consent form is lodged at (name and address of medical school) -

To sign up to the Organ Donor Register call 0845 60 60 400 or visit www.uktransplant.org.uk

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

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

For information about dealing with someone's estate, see Age Concern's factsheet 14 (contact details on page 12)

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 6)
- D) Inform the Tax Office

Address

Postcode _____ Reference number _____

- E) Inform Social Security Benefits Office (for example, Pension Service, Jobcentre Plus)

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 12).
- 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 12).

WHERE TO FIND THINGS

House keys (including spare sets)

Birth certificate

Marriage/Civil Partnership 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

TV Licence

Log book and insurance certificates

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

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

Motor breakdown cover

Cable/Satellite TV provider

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 to receive a full list of factsheets, a book catalogue or this information in large print phone 0800 00 99 66 (free call) or write to Age Concern FREEPOST (SWB 30375), Ashburton, Devon TQ13 7ZZ.

Find out more about Age Concern England online at www.ageconcern.org.uk

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