



wilson browne  
SOLICITORS

# ALL ABOUT ME

All your important information in one place

# For the practical details of your life

Papers get mislaid, important documents are filed in never to be found “safe places”, it’s a constant battle to keep up to date.

This all about me book has been created to give you the opportunity to record some of the necessary details of your life such as where your Will is stored, utility providers etc. that may help your loved ones should you no longer be with them.

Take the time to put all your affairs into one place for your family and friends to carry out your final wishes.

Ensure you keep it up to date and in a safe place where your loved ones can find it.

Please do not include bank account numbers, PIN or key security information in the booklet.

**#allthehelpyouneed**

## How to use your booklet

There's lots to consider so take your time. Please also remember to tell your family or next of kin that you have completed this book and more importantly, where they can find it.

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# Your Personal Details

In this section complete information about yourself, spouse, partner, civil partner or your next of kin.

There is also a space to document the contact details of close friends and your furry friends!



## All about you

Title

Forename(s)

Last name

Birthday

Address

Postcode

Country

Telephone

Mobile

Email

## Spouse, partner, civil partner or next of kin

Title

Forename(s)

Last name

Birthday

Address

Postcode

Country

Telephone

Mobile

Email

Relationship

## Your children, parents, dependants or other close family

Title

Forename

Last name

DOB

Address

Postcode

Country

Telephone

Mobile

Email

Relationship

## Your pets

Name

Type/breed

DOB

Male/female

Chip number

Special needs

Name of vet

Telephone

Location of  
vaccinations  
record

Insurance Co.

Policy num.

Telephone

Your wishes

## Your close friends

Title

Forename

Last name

Birthday

Address

Postcode

Country

Telephone

Mobile

Email

How you met



## Where do you keep your address book or contact details list?

List your close friends to enable your next of kin to notify them of your passing or if you keep an address book simply advise here where it is kept.

## Your Medical Conditions

Detail of any illness or drug therapy that might affect emergency treatment

Do you suffer from allergies or any allergic reaction to medication?

Are you taking any medicines?

If yes, what for?

Where do you keep your medication?

Have you opted out of Organ Donation?

Have you signed a 'Do Not Resuscitate Order'?

# Your Contacts

**You may have many contacts who have become part of your life.**

Record these in this document so that they are all in one place. These may be your doctor, your employer, your local vicar, memberships of clubs or even a volunteer group.

## Your health contacts

(e.g. doctor, hospital consultant, optician, dentist etc.)

Contact type

Name &  
address

Telephone

Contact type

Name &  
address

Telephone

## Your work contacts

(e.g. employer, voluntary work)

Contact type

Name &  
address

Telephone

## Your home contacts

(e.g. cleaner, neighbour, home help, local authority care manager etc.)

Contact type

Name &  
address

Telephone

## Your organisation contacts

(e.g. clubs, memberships etc.)

Contact type

Name &  
address

Telephone

Contact type

Name &  
address

Telephone



## Your local traders

(e.g. newsagent, gardener, taxis or shops where accounts are held)

Contact type

Name &  
address

Telephone

## Other contacts

(e.g. solicitor, accountant etc.)

Contact type

Name &  
address

Telephone

## Other contacts continued

(e.g. solicitor, accountant etc.)

Contact type

Name &  
address

Telephone

Contact type

Name &  
address

Telephone

# Your Financial Information

Please **DO NOT** record any PIN or security information.

Store all your financial information in this section such as your bank accounts, mortgage accounts, Lifetime mortgages, ISAs, Premium Bonds etc.. There is also space to record pension details, PEPs or endowment policies.

## Financial accounts

Organisation

Telephone

Account holder name

Type of account

Cheque book or Passbook (yes/no)

Debit card (yes/no)

Please **DO NOT** record the card number.

Organisation

Telephone

Account holder name

Type of account

Cheque book or Passbook (yes/no)

Debit card (yes/no)

Please **DO NOT** record the card number.

Organisation

Telephone

Account holder name

Type of account

Cheque book or Passbook (yes/no)

Debit card (yes/no)

Please **DO NOT** record the card number.

Organisation

Telephone

Account holder name

Type of account

Cheque book or Passbook (yes/no)

Debit card (yes/no)

Please **DO NOT** record the card number.

## Pensions, shares, PEPs, Premium Bonds or endowment policies

Organisation

Type

Telephone

Organisation

Type

Telephone

Organisation

Type

Telephone

Organisation

Type

Telephone

Organisation

Type

Telephone

Organisation

Type

Telephone

## Credit and store cards

Please **DO NOT** record the card numbers

Card

Issuer

Telephone

Card

Issuer

Telephone

Card

Issuer

Telephone

Card

Issuer

Telephone

## Any other regular payments

(e.g. standing orders, direct debits, membership fees)

Organisation

Email

Telephone

Organisation

Email

Telephone

Organisation

Email

Telephone

Organisation

Email

Telephone



## Where do you keep all these types of financial documents?

Have you recently completed an Equity Release Scheme?  
Is this a Lifetime Mortgage or a Home Reversion Plan?  
Where is this information stored?

The information contained in this section will allow your next of kin to finalise your estate and look after your affairs should the need arise. Knowing where these documents are will make the process of completing your wishes much simpler.

## Your utility and key suppliers

Record all your utility and key suppliers in this section including insurance policies that cover your life arrangements

	Supplier	Telephone
Water		
Sewerage		
Gas		
Electricity		
Telephone		
Mobile phone		
Internet		
Cable/Sat TV		
Council Tax		
Landlord/rent		
Other		

## Your insurance policies

### **Buildings Insurance**

Organisation

Location of documents

Telephone

Renewal

### **Contents Insurance**

Organisation

Location of documents

Telephone

Renewal

### **Motor Insurance**

Organisation

Location of documents

Telephone

Renewal

### **Breakdown Insurance**

Organisation

Location of documents

Telephone

Renewal

## Your insurance policies

### Life Insurance

Organisation

Location of documents

Telephone

Renewal

### Other Insurance

Organisation

Location of documents

Telephone

Renewal

### Health Insurance

Organisation

Location of documents

Telephone

Renewal

### Other Insurance

Organisation

Location of documents

Telephone

Renewal

# Your Important Documents

Everyone collects a large number of legal documents as they get older. These could be certificates for births, marriage, civil partnerships or Wills. It's important to note where these are so that they can be found by family or your executor if they need to manage your affairs in the future.

## Your personal document locations

Birth certificate

Marriage/  
civil partnership  
certificate

Deeds to your property

Passport

Driving licence

Television licence

National Insurance card

NHS card

Bus pass or travel card

Other



If you have a Will, a Power of Attorney (PoA) or living Will, please indicate where these documents can be found.

**Will**

Executor(s) named in the document

**Power of Attorney**

Attorney named in the document

**Living Will (otherwise called Advance decision/statement or directive)**

Executor(s)/attorney/nominated person as named in the document

# Your Property and Vehicles

It can be extremely useful to maintain a record of your property and the vehicles you own so people know what they are, where they are located and where key documents relating to them are kept.

## Your property

### Property 1

Address

Postcode

Country

Telephone

Freehold owner or leaseholder?

If freehold owner, do you have an equity release or mortgage on the property? If so, provide details:

If leaseholder, who is your landlord?

Landlord

Telephone

Do you have a tenant?

Tenant

Telephone

Any further details you would like to document:

## Your property

### Property 2

Address

If leaseholder, who is your landlord?

Landlord

Telephone

Postcode

Do you have a tenant?

Country

Tenant

Telephone

Telephone

Freehold owner or leaseholder?

If freehold owner, do you have an equity release or mortgage on the property? If so, provide details:

Any further details you would like to document:

## Your property

### Property 3

Address

Postcode

Country

Telephone

Freehold owner or leaseholder?

If freehold owner, do you have an equity release or mortgage on the property? If so, provide details:

If leaseholder, who is your landlord?

Landlord

Telephone

Do you have a tenant?

Tenant

Telephone

Any further details you would like to document:

## Your vehicles - cars, motorcycles, caravans, mobility scooters

### Vehicle 1

Name of keeper of vehicle

Make/model/registration

Location of documents  
relating to the vehicle

Servicing/warranty details

Garaging/parking permits

### Vehicle 2

Name of keeper of vehicle

Make/model/registration

Location of documents  
relating to the vehicle

Servicing/warranty details

Garaging/parking permits

### Vehicle 3

Name of keeper of vehicle

Make/model/registration

Location of documents  
relating to the vehicle

Servicing/warranty details

Garaging/parking permits

### Vehicle 4

Name of keeper of vehicle

Make/model/registration

Location of documents  
relating to the vehicle

Servicing/warranty details

Garaging/parking permits



# Your Significant Possessions

**Significant items such as jewellery, antiques, or furniture can be recorded here to enable someone else to manage your affairs.**

You may have items of sentimental value such as historical photographs and items from your childhood that you wish to pass on.

**Item 1**

What?

Where?

Useful  
details

**Item 2**

What?

Where?

Useful  
details

**Item 3**

What?

Where?

Useful  
details

**Item 4**

What?

Where?

Useful  
details

**Item 5**

What?

Where?

Useful  
details

**Item 6**

What?

Where?

Useful  
details



# Your Final Wishes

**What will undoubtedly be a difficult time for your loved ones can be made so much easier if they know what arrangements you would have liked. Record your wishes here for when others will have to administer your affairs**

I have already thought about my funeral arrangements, they are stored

It's a difficult topic but if you haven't already completed your funeral wishes, it can avoid misunderstanding or unhappiness when you are no longer around to resolve them. There's a lot to think about; whether you wish to be cremated or buried, what kind of service you would like, what words you would like said and any particular readings or music. This book provides the perfect opportunity to advise your loved ones what you want. There's lots to think about so take your time and give yourself peace of mind knowing that the people you care about will be fulfilling your wishes wherever possible.

## We've listed some questions to help make the process easier

If you have arranged to donate your body to medical science, please note here who needs to be notified of your death to make the necessary arrangements:

Name

Telephone

Would you like a funeral service or a brief committal at the graveside or crematorium?  
If yes, in which religion / spiritual belief / philosophy?

If yes, where would you like it to be held?

Do you have a strong preference which funeral director is engaged?

I would want to be; Buried          Cremated

### **Burial**

If you have arranged for a burial plot, please give details, e.g. existing plot/pre-purchased plot, who owns the plot and where the documents are kept.

If not, where would you like to be buried, e.g. religious location/ cemetery/woodland or green site/other? Please give details.

**Cremation**

I do not mind where I am cremated

I would prefer to be cremated at

I would like my ashes to be:

scattered

buried

interred

kept

Please indicate where, e.g. a special place, crematorium burial plot, religious location, family grave, crematorium garden of remembrance, an urn or I would like to allow my family to decide.

I would like my coffin to be

I would like my body to rest e.g. at the funeral home, at home, in the family home or at the church the night before the service.

I would/would not prefer my body to be embalmed if possible

I would prefer my body to be dressed in

Your preference about what route is taken to the service/ crematorium/cemetery if any

I would like my funeral to be conducted by:

Name

Telephone

I would like the following at my funeral

Music e.g. songs sung or played.

Readings e.g. poems, eulogy, religious words.

Prayers

I would wish the announcement of my death to be made in the following publications.

I would like the following people to be asked if they would take part in the funeral e.g. as a coffin bearer or a reader:

Name

Telephone

Role

Name

Telephone

Role

Name

Telephone

Role

If you would like flowers, do you have a preference on what type?

**Special requests**

Other wishes e.g. requests, cultural or religious requirements and customs not already covered, care for any pets

I would prefer donations to go to the following charities:

Name/s of charities

**Memorial**

I would like a memorial stone of the following type and with the following words.

I have/have not made some financial provision for these arrangements and wishes. If yes, give details.

I would prefer another type of commemoration, e.g. bench, tree planted, donation to a charity.

**After the funeral**

I would want my family and friends to join together and:



## Digital and social media accounts - Your social media will

It's important to consider your online accounts and should you pass away how your family or next of kin will need to deal with them. For some people they may prefer to close the account of their loved one straight away, others may choose to memorialise the account. In either case, they will need to know usernames and provide a copy of a death certificate in order to do this. Record your wishes here.

Online Accounts/Social Media Sites

Username/Email Address

How do you want this account to be managed?  
i.e. closed, memorialised or deactivated.

Have you downloaded a copy of your files on this account?  
Where is this stored?

Who would you like to manage this account? i.e. your digital executor



Online Accounts/Social Media Sites

Username/Email Address

How do you want this account to be managed?  
i.e. closed, memorialised or deactivated.

Have you downloaded a copy of your files on this account?  
Where is this stored?

Who would you like to manage this account? i.e. your digital executor

## Additional services that might be of interest

### 1. Have you considered an Equity Release Scheme?

You should talk to an Independent Financial Advisor regulated by the Financial Conduct Authority. We offer fixed fees for Equity Release legal advice.

### 2. Safeguard your future with an LPA

A Lasting Power of Attorney is a legal document allowing you to appoint someone you trust (Your Attorney) to deal with any Property and Financial and/or Health and Welfare decisions on your behalf. Making an LPA is a safeguard for the future but does not necessarily mean you lose control over your affairs. Accidents can strike at any time but being prepared can go a long way.

### 3. Caring for a loved one?

There are lots of reasons why you may be caring for someone – old age, illness, accident and other reasons, and caring for those close to us can be a challenging task whether you are a carer for a spouse, relative, or even a close friend.

Even if you are able to make your own decisions in relation to your health, welfare and finances, you may be unsure of where to get help. The rules and regulations relating to care home fees can be confusing and you could find yourself dealing with many different organisations. At Wilson Browne Solicitors, our specialist team of solicitors can advise on all aspects of care home fee funding. We

understand the needs of our clients and can offer free home visits, subject to agreement, so we can visit you wherever it's most convenient.

### 4. Thinking of moving home?

Buying or selling a home can be an exciting time as long as you have someone to take away the stress and uncertainties. We are recognised as experts and approved by lenders and developers. Don't be fooled by artificially low prices.

Many firms will lure you in with promises of cheap conveyancing, and hit you with a big bill for all the 'extras'. Make sure you really know the cost before deciding on that 'cheap' quote. Our pricing is transparent – we're upfront about costs and there's no big list of hidden extras.

### 5. Disputes and litigation

It's an unfortunate reality that disputes and injuries arise every day. Disputes come in all shapes and sizes from disputes with a neighbour, or a professional such as a local authority, builder or contractor, lawyer, accountant or surveyor, to disputes with an employer.

At Wilson Browne we understand that when there's a dispute, or you rely on advice which is wrong, it can have a far-reaching impact on you or your business.

## **6. Difficulties at work have a huge impact on a person's life**

You need someone on your side. Someone who is professional but down to earth and friendly - that's us. Whether it's a settlement agreement, employment tribunal claim, discrimination, unfair or constructive dismissal, pregnancy and maternity discrimination we can help and offer a free, no obligation consultation.

## **7. Business Law Services**

Wilson Browne Solicitors are proud to have been named Northamptonshire Law Society's Law Firm Of The Year for 2017/18, 2019 and 2021. Many of our business lawyers are recognised in the Legal 500 (a who's who of the legal profession).

We pride ourselves in delivering commercial, cost-effective and practical advice to our clients. If yours is a fledgling business, a mature one, owner managed, PLC or subsidiary of an overseas parent, then we advise businesses just like yours across a broad range of issues.

**wilson browne** SOLICITORS

All the help you need

**0800 088 6004**

**[enquiries@wilsonbrowne.co.uk](mailto:enquiries@wilsonbrowne.co.uk)**

**[wilsonbrowne.co.uk](http://wilsonbrowne.co.uk)**