



fmifa

When I'm gone...

A simple way to record your funeral wishes and your personal and financial details in one place

“Life’s better now we have a plan”

fmifa

fm are a firm of independent financial planners, founded in 1991. We provide high quality financial solutions to both individuals and businesses; our ethos is centred upon providing the highest possible level of service to our clients. We are experienced in helping you think through your issues, opportunities and future goals to create a personalised financial plan and investment portfolio. Our friendly and highly professional team has many years in the financial services sector. Whether it is retirement planning, investment and saving advice, pensions, inheritance tax, estate planning, mortgages, equity release or employee benefits, we have the knowledge and the expertise to help with your particular needs.

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.

Financial Management (fm) have 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 the sections you complete
- Find a safe place to keep it – such as with your Will in a safe, locked filing cabinet or at your solicitor's office
- Please do not write security information about your accounts such as passwords or PIN numbers in this document
- Let your family or close friends know about it
- Update it once a year or when your circumstances change

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MY PERSONAL DETAILS

Full Name _____

Date and Place of Birth _____

Other Names (for example maiden name) _____

National Insurance Number _____

National Health Number _____

Tax Reference Number _____

Passport Number _____

Driving Licence Number _____

I am am not an organ donor _____

NEXT OF KIN OR KEY CONTACT

Full Name _____

Relationship _____

Telephone Number _____

Address _____

Email Address _____

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

MY IMPORTANT DOCUMENTS

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 is kept _____

My most recent Will is dated _____

I have written a letter of wishes and it is kept _____

MY EXECUTORS ARE

Name _____

Relationship _____

Address _____

Telephone Number _____

Email Address _____

Name _____

Relationship _____

Address _____

Telephone Number _____

Email Address _____

MY FINANCIAL DETAILS

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 and passwords here.

FINANCIAL ADVISER

Name of adviser

Contact details

CURRENT ACCOUNTS

Bank/Building Society

Account Number

Sort Code

Name(s) in which account is held

Bank/Building Society

Account Number

Sort Code

Name(s) in which account is held

SAVINGS ACCOUNTS

Bank/Building Society

Account Number

Sort Code

Name(s) in which account is held

Bank/Building Society

Account Number

Sort Code

Name(s) in which account is held

MORTGAGE

Bank/Building Society _____

Name(s) in which account is held _____

CREDIT & STORE CARDS

Issuer Name _____

Card Number _____

Issuer Name _____

Card Number _____

Issuer Name _____

Card Number _____

Issuer Name _____

Card Number _____



Tell Us Once is an online service that lets you report a death to most government organisations in one go.

PENSIONS & ANNUITIES

This could include a final salary pension from an employer, schemes you joined through your employer and pension schemes you've set up yourself.

Provider Name	Reference Number
Provider Name	Reference Number
Provider Name	Reference Number
Provider Name	Reference Number

LIFE INSURANCE & CRITICAL ILLNESS (CI)

Life Insurer	Reference Number
Life Insurer	Reference Number
Life Insurer	Reference Number
Life Insurer	Reference Number
CI Insurer	Reference Number

fmtip } Our recommendation is a family's life insurance should provide cover for 10x the higher earner's salary.

INVESTMENTS

Provider Name _____ Account Name(s) _____

Provider Name _____ Account Name(s) _____

Provider Name _____ Account Name(s) _____

Provider Name _____ Account Name(s) _____

Provider Name _____ Account Name(s) _____

Provider Name _____ Account Name(s) _____

Provider Name _____ Account Name(s) _____

Provider Name _____ Account Name(s) _____

SHARES

Company Name _____

Company Name _____

Company Name _____

Company Name _____

Company Name _____

Company Name _____

fmtip } Nominating a beneficiary(ies) within pension plans is an effective method of directing death benefits. The same applies to creating a life assurance policy into trust. A financial adviser can help with this.

CAR INSURANCE & BREAKDOWN COVER

Vehicles Registration Number(s)

Car Insurance Company

Policy Number

Car Breakdown Company

Reference Number

HOUSE INSURANCE

Contents Insurance Company

Policy Number

Buildings Insurance Company

Policy Number

OTHER INSURANCE (Pet, Travel, Boiler Cover, Health etc.)

Provider Name

Provider Name

Provider Name

LOANS/HIRE PURCHASE

Loan Provider _____ Telephone Number _____

Loan Provider _____ Telephone Number _____

BENEFITS/ENTITLEMENTS

Name of Benefit _____ Name of Benefit _____

Name of Benefit _____ Name of Benefit _____

RENTAL AGREEMENT

Landlord's Name _____

Landlord's Contact Details _____

UTILITY PROVIDERS

My gas provider is _____

My electricity provider is _____

My water company is _____

My broadband provider is _____

My telephone company is _____

My mobile telephone company is _____

My television provider is _____

My local council (for council tax) is _____

REGULAR PAYMENTS

Charity Donations	Payment type
Club Membership	Payment type
Subscriptions	Payment type
Other	Payment type

OTHER PROPERTIES

Property
Address
Property
Address

SIGNIFICANT POSSESSIONS/VALUABLES

Description	
Where kept	Value

MY CONTACTS

Solicitor	Contact
Accountant	Contact
Doctor	Contact
Dentist	Contact
Optician	Contact
Organisations/Societies	Contact

DIGITAL ACCOUNTS

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 ANY OF THE FOLLOWING:

- Social media accounts (for example Facebook, Twitter, LinkedIn)
- Email accounts
- Online financial accounts
- Online auction site accounts (for example 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.



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..

FUNERAL PLAN

I have a funeral plan with _____

My funeral plan documents are kept _____

POWER OF ATTORNEY

I have a Power of Attorney YES NO It is dated _____

It is registered with the Office of the Public Guardian YES NO

My attorneys are

Name _____

Address _____

Relationship Telephone Number _____

Name _____

Address _____

Relationship Telephone Number _____

WHERE I KEEP OTHER IMPORTANT DOCUMENTS

My Birth Certificate Marriage Certificate _____

Passport Other _____

FUNERAL WISHES

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.

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 the newspaper and if so, which one?
- If you're to be buried where you'd like 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.

ARRANGEMENTS FOR CHILDREN

If you have children who are still minors (under 16 in Scotland or under 18 for the rest of the UK) it is important to appoint guardians (the people you would want to raise and care for them if you were no longer around).

The best place to do this is in a Will, as you can specify what assets should be used for your children's everyday needs and whether they should inherit any assets when they reach a specified age. You can also say how they should be raised.

ARRANGEMENTS FOR PETS

If you have pets, use the space below to make a note of what arrangements you'd like to be made for them.

Signature

Date

“Talking about death and dying won't make it happen. But not talking about it or not planning for it, can leave people worse off than they need to be.”

Gary Rycroft
Chair of the Dying Matters Forum

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If you have completed 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.

fmifa

Independent Financial Advice

Wealth Management | Investments

Retirement Planning & Pensions

Mortgages & Equity Release | IHT Planning

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