Download and save to your computer before completing Part B

The Movement for Progressive Judaism
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"Life would be better if we faced up to death"

(Janice Turner in The Times - December 2nd 2017)

Have you??

We all plan for the birth of a baby.
How many of us plan for the end of our lives?
How many of us tell our family what we want?

The check list, and the form which follows will make it much easier for your family to cope, if one day you can't manage your affairs and also when you die – whether this is sudden and soon, or in many years' time.

It will allow you to plan for your death as others planned for your birth.
It is not a Will. Together with your Will, this document will help you to die in peace.

You should consider answering the questions now, not "later"; later may be too late!

Whether you are in the prime of your life or in older age, but not please when it is too late!

The check list summarises most if not all of the possible information that will be needed by your next-of-kin and your executors and is designed around many real end-of-life experiences. The form allows you to record all this information and keep it up to date.

The form, when completed, will enable you, throughout the rest of your life, to be content that you have left no stone unturned. It is a gift to your family.

It is a good idea to check and update your form once a year or when major events occur. You can either:-

A. make your own notes using the check list which follows or
B. use the "Advance Personal Information" form, which you can complete on your computer and then print off a paper copy and/or save to your computer, or you can print the form then fill it in by hand. If completed on your computer, it is highly recommended that you save it to a plug-in USB "memory stick"

Either way, it will, of course, be a highly confidential document and it is recommended you file it with your will and in any event keep it very safe and let your family know where it can be found.

Remember that your document will not be for you; it will be there to help your loved ones cope when you are very ill or when you die. The document will be a legacy to them, something that will make life just that bit easier for your family at their time of distress. It will be your document; make it what you want it to be. But do it now - not next month or next year!

The check list is divided into several sections, all aimed at prompting you to answer the questions so others can manage your affairs when you no longer can.

1. Your personal information, including contact details for your family
2. Your wishes for when you die
3. Money matters, including investments
4. Employment & retirement matters
5. Your home and how to look after it
6. Your health and welfare
7. Your car and other possessions
8. Your pet and its welfare
9. Your digital legacy including social media and your computer
10. Inheritance Tax matters

Dying matters, so let's talk about it.
Download this document from: www.bit.ly/ProgressiveJudaism

To contact form designer please email:- r140141@gmail.com

A: Check List

1. About You
    a. Your name, date & place of birth, home address, contact details & National Insurance Number
    b. Partners name and contact details
    c. Next of kin details (if different)
    d. Children's names and contact details
    e. Passport number and where issued
    f. Where you keep you diary
    g. Your religion (if appropriate)
2. Your Wishes
    a. Made a will? ; if so where is it?
    b. Do you have a solicitor or probate professional?
    c. Executors?
    d. A "Lasting" or "Enduring" Power of Attorney? and if "Lasting" details for both Health and Welfare & Financial
    e. When you die, would you like this to be at home, hospital, hospice?
    f. Funeral:
        i. burial or cremation?
        ii. funeral expenses scheme?
        iii. Burial or cremation scheme?
        iv. If cremation, ashes to be scattered?
        v. Any special wishes for funeral service?
        vi. List of those to be informed?
3. Finances
    a. Bank Account Details
    b. Accountant or tax advisor?
    c. Stockbroker?
    d. Independent Financial Advisor (IFA)?
    e. Investments; where recorded?
    f. Any outstanding loans, exc. mortgages?
    g. Standing Orders and Direct Debits; where recorded?
    h. Credit and debit card details
    i. On-line access to bank accounts - where are details recorded?
    j. HMRC: Tax Office details and your unique Tax Reference (UTR)
    k. Details of any state benefits, exc. state pension.
4. Employment and 5. Retirement
    a. Employers name and contacts
    b. Annuity schemes?
    c. Death-in-Service or other life insurance?
    d. If retired; pension details
5. Your Home(s)
    a. Address of principal home and other homes
    b. Owned or rented?
    c. If rented - give details

d. Who resides in each home?
e. Any mortgages?
f. Where are deeds?
g. Utility providers
h. Pet details
i. Key holders
j. Home and contents insurance
k. Travel Insurance?
l. Other property owned (boats, etc)
m. Your Safe: How to Access

7. Your Health
    a. Doctors contact details
    b. NHS Number
    c. Dentist, Optician and audiologist
    d. Medical Insurance?
    e. Allergies
    f. Donor Card signed? (where is it?)
    g. Completed an "Advance Directive"?; where is it?
    h. Would you want die at home, hospice or hospital?
8. Your Car(s)
    a. Details of each car (when bought, what car, Registration number, where kept.
    b. Where is registration Certificate(s)?
    c. MOT; when due?
    d. Road Fund Licence; when renewed?
    e. Driving Licence; where kept?
    f. Car Insurance details
    g. Car Keys?
9. Your Digital Legacy
    a. Make and model of computer
    b. email address(es) and passwords to access messages
    c. Other devices such as mobile phones and tablets
    d. Any programs on computer which may need to be accessed for probate details?
    e. Social Media such as Twitter, Streaming Services, photo sharing web sites and Facebook. Passwords to access?
    f. If using an Apple device what is Apple ID and password
10. Your Inheritance Tax Matters
    a. Any gifts, over £200 each, given over last 7 years?
    b. Letter of wishes: if so does executor know where filed?
    c. Any charitable donations, other than in your Will you wish executor to make?
11. Miscellaneous
    a. Any other matters for your family, attorneys and executors to note?

B: Advance Personal Information

Name:	Date Completed or last revised:

1. About You:-

Date and Place of Birth	National Insurance No
Your address	
Landline Phone:-	Mobile Phone:-
Partner's name:-	Relationship:
Contact Address and Phone Number	
Next of kin (if different):	Relationship:
Contact Address and phone number	
Children's name and contact details:	

Document Location

- Your diary (paper or on-line?)
- Passport & number
- Driving Licence
- Birth Certificate
- Marriage Certificate
- Car Insurance Policy
- Travel Insurance
- Pension papers

Your Religion (if any)	Religious affiliation (membership details)

2. Your Wishes:

Have you made a Will?	If so, date executed:-
Location	
Name and contact details of your solicitor or probate professional	
Your Executor's name and contact details	
Do you have an Enduring or Lasting Power of Attorney? (if so state which)	
If Lasting give details for each of "Health & Welfare" and "Financial"	If Enduring, Executed?
Location:-	
Where would you like to die? (home, hospital or hospice) Who would you like to have with you?	
Your Funeral: Give details below, even if already in your Will Funeral: burial or cremation?	
Funeral expenses scheme or insurance details, if any	
Burial or Cremation scheme details, if any	
If cremation; do you want your ashes scattered?	
If so, where?	
If buried, which cemetery or woodland burial place	
and any wishes as to where in cemetery for your grave?	
Detail here or on a separate paper any special wishes for officiant and actual ceremony, music, readings:-	
Any thoughts of type of coffin?	
If you have a list of those to be informed of your death, where is it?	

3. Your Finances

Bank Account 1

- Name of bank:
- Branch name and address:
- A/C Name: | Branch sort code:
- A/C Number: | Type of account:
- Joint Account (?); if so with whom:-
- Phone number of bank:

Online banking: give details below or state where details filed

- web address:-
- username:- | password ** :

Other log-in details?

Where are bank papers for this account filed?

Bank Account 2

- Name of bank:
- Branch name and address:
- A/C Name: | Branch sort code:
- A/C Number: | Type of account:
- Joint Account (?); if so with whom:-
- Phone number of bank:

Online banking: give details below or state where details filed

- web address:-
- username:- | password ** :

Other log-in details?

Where are bank papers for this account filed?:

Other bank accounts: give details here and/or under box 11 on page 13.

For online or phone access to bank accounts - give details or where access details and passwords are stored

Your Accountant or Tax Advisor:
Your Stockbroker (if appropriate):
Your Independent Financial Advisor (IFA):
Your Investments, including shares, Premium Bonds etc: Where recorded?
Do you have any outstanding loans (other than mortgages)? If yes, give details below:-

List Credit and Debit Cards held: ensure PIN number(s) recorded securely and indicate here where stored:

	Card Type	Long Number	Date Issued	Expires, end
1.				
2.				
3.				
4.				
5.				

Details of where on-line access to credit card companies with passwords are filed.
Details of where all standing order and Direct Debit details are listed and filed
HMRC: Unique Tax Reference (UTR) and address and phone number of your Tax Office
Amounts received from state such as unemployment benefit, disability living allowance etc

4. Your Employment (If employed or self employed)

Your Employer(s): name of organisation and contact person
Annuity(ies): Details of organisations and account numbers of all who hold pension funds for annuity purposes
Death-in-Service or other life Insurance details

5. Your Retirement Details (if you have retired and are drawing pension)

Show details of State, occupational & private pension providers with name, policy no. and contact details

6. Your Home(s)

Address of principal home:	
How long lived there?	
Council Tax Authority:	
Details of all people, with ages if children, domiciled there: Your Safe: How to access	
Owned or rented:	
If rented, details of rental agreement and contract	
If owned, and any o/s mortgage, contract and contact details for mortgage company	
If owned outright (no mortgage): where are deeds and land registry filed?	

Utility Providers (give name, a/c number and contact details
• Gas:
• Electricity:
• Water and main drainage:
• Landline phone:
• Internet:
• Mobile Phone: (Also record where PIN number filed):
• Burglar Alarm:
Details of pet(s), any pet insurance and details of anyone else who can look after pet(s) for short or long term
Key Holders: Where are home keys kept?
List here next door neighbours or others holding keys to your home
Details of home and contents insurance
Details of Travel Insurance Policy held
Details of any other property owned (houses, boats etc)

7. Your Health

Have you completed an "Advance Decision" (Living Will)? If not download from www.bit.ly/Advance-Decision
If yes, where filed and does your doctor have a signed copy?
"DNR": (Do Not Resuscitate) : Has this been discussed? if so with whom and are your family aware? Note; if this is your wish you must ensure your doctor has a written record updated annually.
Given a choice would you rather die at home or in hospital or hospice?
Your NHS Number:
Your Doctor's details
Your Dentist's details
Your Optician's details
Your audiologist's details (for hearing aid)
If you have private medical insurance give details below:
Show below drugs being taken for chronic conditions, and show here when updated:
Any allergies?
Have you signed a donor card and if so where is it?
Details any NHS Funded Nursing Care and NHS Continuing Healthcare payments being received

8. Your Car(s)

• Make and model:
• Registration Number:
• Owned or Leased? If leased, details of leasing company
• Company Car? If so, company contact:
• Date of first registration: Date of purchase or lease, if not new:
• Registration Certificate; where kept:
• Where usually serviced:
• MOT; when next due:
• Car Insurance company and policy number:
• Road Fund Licence; when due:
• Driving Licence; number, expiry date and where kept:
• Keys including spare(s); where kept:

9. Your Digital Life

Make and model of computer:
If password required to operate: give it here or describe where filed
Your email address(es) and passwords to access email account(s)
Details of all other devices such as tablets with the PIN or password to access (or indicate where filed) If using an Apple device, include Apple ID and password
If any programs could provide information for probate, give explanation of what used for and password(s)
Details of social media [Facebook, twitter etc], Streaming Services and photo sharing sites with passwords.

10. Your Inheritance Tax Matters

Detail all gifts (over £250 each) given over last 7 years showing amount, date and recipient
Letter of Wishes: If you have prepared a schedule of items, outside of your will, that you wish to gift to others, and of which you wish your executors to take account, where is the schedule filed? (Ideally with your will)
List any charitable donations you wish to make, other than those in your Will, Codicils or schedule above

11. Miscellaneous

"What to do Now": Consider writing a "What to do now" list for your partner/next-of-kin/executor to help them know what they should do in the first few days after your death.
Use this space for any other notes, and consider attaching a list of those to be notified of your death
Name and signature of person completing form, with date

** Note: this refers to passwords. Rather than include them in this schedule you may prefer to make a list of all passwords used for all your devices and programs and then file it securely. If so indicate here who has a copy or knows where your list is stored.

Death Admin Checklist:

Broken down by time frames and categories to help you stay organized. See Next Page

Death Admin Checklist:

On Death, next-of kin should; -

Notify close family and friends

☐ Contact the GP / hospital to obtain the Medical Certificate of Cause of Death
☐ Arrange care for pets, property, or dependents (if applicable)
☐ Locate any advance funeral plan or will
☐ Register the death at the local registry office
☐ Obtain multiple copies of the death certificate

Funeral Arrangements

☐ Choose funeral director (if not pre-arranged)
☐ Decide on burial or cremation
☐ Organise venue, date, and service details
☐ Notify wider community/friends of funeral
☐ Arrange obituary or death notice
☐ Organise flowers, music, eulogy, etc.

Legal & Estate Administration

☐ Locate the will (or determine if there isn't one)
☐ Contact the executor(s) of the estate
☐ Apply for probate or letters of administration
☐ Notify solicitor or use legal help if needed
☐ List all assets, debts, and bank accounts
☐ Secure property and valuables
☐ Cancel or transfer insurance policies
☐ Notify mortgage lender or landlord
☐ Pay any outstanding debts or bills
☐ Begin estate distribution as per the will or intestacy

Financial & Government Notifications

☐ Use the "Tell Us Once" service (UK) to notify:
- – HMRC
- – DWP
- – Passport Office
- – DVLA
- – Local council

☐ Inform:
- – Banks and building societies
- – Pension providers
- – Utility companies
- – Credit card companies

☐ Cancel or transfer:
- – Subscriptions and memberships
- – Phone and broadband
- – TV Licence

Continued…

Digital & Social Media

☐ List all email and social media accounts
☐ Close or memorialise social media profiles
☐ Cancel or transfer digital subscriptions (Netflix, Spotify, etc.)
☐ Retrieve or store important digital data or photos

Other Practicalities

☐ Redirect post via Royal Mail
☐ Cancel NHS appointments or services
☐ Notify GP, dentist, optician
☐ Return medical equipment or mobility aids
☐ Cancel Blue Badge (if applicable)
☐ Review and update your own will or plans

Grief & Support

☐ Inform religious/spiritual communities
☐ Seek bereavement support or counselling
☐ Consider how to mark anniversaries or memory events
☐ Keep a memory box or photo archive
☐ Talk with children about the loss if needed