



# What to do when I die organiser

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Introduction

Thinking about dying is never easy, so it’s perfectly normal to keep putting it off. Sadly all of us will pass away someday, often leaving our loved ones facing an enormous amount of admin at a difficult time.

To help make things easier for those left behind we’ve created this handy PDF which you can either download and fill out digitally, or print off and complete by hand if you feel it would be useful for you and your loved ones.

How to use this organiser

We’ve structured this organiser into three key sections: Funeral wishes and your will, Finances and Everything else.

When you die there’s a timeline of things that need to be done, and some of these are more time sensitive than others. We’ve therefore designed this organiser to help your loved ones find the information they might need as they work through things in the weeks and months after you’ve gone.

Before you get started, it’s worth bearing a few things in mind:

Take your time

Sitting down and thinking about what will need to be done when you die can be hard, so bear in mind that you don’t have to fill in this list all at once .

You might want to consider, for example, completing a section a week, or even one a month. If you feel comfortable, you may want to talk it through with someone you trust. Sometimes, hearing someone else’s opinions might help you shape yours.

Keep this organiser somewhere safe

It’s important to remember that the information you are going to be entering into this document is very sensitive, so you don’t want it falling into the wrong hands.

Make sure that wherever you keep this document, it is safe and secure. If you have a safe or a cabinet that locks, you might wish to store it in there, or if you are keeping it digitally, for example on your computer, make sure it is password protected.

Let your loved ones know

You’ll need to tell someone that you’ve got a ‘What to do when I die’ organiser and where you keep it so they can find it when the time comes. You might also want to think about about photocopying it and leaving it with them so they know everything they need to do.

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## Personal details

This section covers all the standard information that various businesses and bodies use to identify you.

## Your personal details -

<b>Full name</b>	
<b>Previous names</b> i.e. your maiden name or names from previous marriages	
<b>Date of birth</b>	<b>Place of birth</b>
<b>National insurance number</b>	<b>Passport number</b>
<b>Driving licence number</b>	<b>Organ donor?</b>
	Yes No

Date organiser completed

Updated

## Contacts

Use this section to note down the contact details of whoever might need to be contacted when you die. This will probably include the executors of your will as well as your solicitor, accountant, financial advisor and so on.

### Next of kin or key contact

<b>Name</b>	
<b>Relationship</b>	<b>Phone number</b>
<b>Address</b>	
<b>Email address</b>	

## Executor(s) of your estate

<b>Name</b>	
<b>Email address</b>	<b>Phone number</b>
<b>Address</b>	

  

<b>Name</b>	
<b>Email address</b>	<b>Phone number</b>
<b>Address</b>	

# Your other useful contacts

## Solicitor

Name/email/phone number

## Dentist

Name/email/phone number

## Accountant

Name/email/phone number

## Optician

Name/email/phone number

## Financial advisor

Name/email/phone number

## Organisations/societies

Name/email/phone number

## Doctor

Name/email/phone number

## Neighbours (with keys)

Name/email/phone number



# Funeral wishes and your will

## Funeral wishes

Many people who organise a funeral don't even know whether their loved one wanted a burial or cremation, so use this section to outline your funeral wishes in as much detail as you can.

If you aren't too bothered about what sort of send-off you have then it's worth saying that as well. If you've a funeral plan, make sure you make a note of it in this section, too.

It can be hard to know where to start, but some of the things you might want to think about may include:

- Do you want a burial or cremation?
- Do you want a funeral at all? Or would you prefer a direct cremation or burial? Or maybe you would prefer your body to be left to science.
- If you want a funeral, what type of service do you want? Would you like it to be religious, humanist, atheist and so on?
- Have you got a preferred cemetery or burial ground in mind?
- Would you like a memorial? What kind, and where would you like this?
- If you want to be cremated, do you want your ashes scattered, interred or disposed?
- Do you have a preferred funeral director?
- Would you like any particular music, prayers or readings?
- Who would you like to be invited to the funeral?
- Do you have a preferred casket, coffin or shroud?
- Would you like any flowers at your funeral, and if so, what type?
- Do you have a preferred venue for the wake?
- Would you like any donations to be made to any specific charities?



Funeral plan

I have a funeral plan: Yes No

The business that I have my funeral plan with is...

I keep my funeral plan documents...

My funeral wishes

My will

Writing a will is one of the most important things you can do in your lifetime to ease the pain for your friends and family when you die. If you haven't already written one, it's definitely worth organising one now to detail what is to happen to your assets and possessions after you die.

Will

I have a will: Yes No The most recent version is dated

I keep my will...

Letter of wishes

I have a letter of wishes: Yes No The most recent version is dated

I keep my will...

Record of my important documents

You can use this section to outline what important documents you have, where they are stored and when the most recent version was made. You might not have all of the documents listed here, so don't worry about filling out every section, just list what you've got.

Depending on how and where you decide to store your 'What to do when I die' organiser, you might want to keep actual copies of these documents in your file.

Power of attorney

I have power of attorney: Yes No It is dated

My power of attorney is registered with the Office of the Public Guardian: Yes No

Contact details for attorney(s)

Although power of attorney will end when you pass away, those acting as your attorneys will need to be notified of your death if they haven't been already. Use this section to note down the contact details for those acting as your attorneys:

Name

Email address

Phone number

Address

Name

Email address

Phone number

Address

Other important documents

Birth certificate location

Marriage certificate location

Divorce certificate location

Passport location

Driving licence location

Vehicle registration location

NHS medical card location

Other:

Other:

Other:

Other:

Other:

## Finances

Working out finances can be one of the most stressful things about sorting out someone's estate, so use this section to make a note of all your financial information, including accounts, savings pots, loans, mortgages, pensions, insurances and bills.

Wherever you can, outline the companies you hold accounts with, any customer numbers which might be useful, and where you keep any statements or other documents relating to these accounts.

### Overview

My finances are made up of the following products and accounts:

#### 13 Accounts

Current accounts  
Investments  
Savings account  
Shares

#### 15 Pension

Defined contribution  
Defined benefit  
Private pension  
State pension  
Annuity

#### 16 Borrowing

Mortgage  
Credit card and/or store cards  
Loans  
Items on finance (sofas, electricals, cars etc)

#### 18 Insurances

Life  
Home  
Buildings  
Car

#### 20 Utilities

Gas  
Electric  
Water  
Mobile phone contract  
Broadband  
Television

#### 20 Benefits

#### 21 Regular payments and subscriptions

#### 21 Significant possessions

Property  
Vehicles

## Accounts

### Current account(s)

Bank / building society:

Name(s) the account is held in:

Bank / building society:

Name(s) the account is held in:

Bank / building society:

Name(s) the account is held in:

### Savings

Bank / building society:

Name(s) the account is held in:

Bank / building society:

Name(s) the account is held in:

Bank / building society:

Name(s) the account is held in:

## Investments ---

Provider

Name(s) the account is held in

Contact details

Provider

Name(s) the account is held in

Contact details

## Shares ---

Company name

I keep my certificate...

Company name

I keep my certificate...

## Pensions

### Defined contribution (money purchase) ---

Company

Phone number

Reference number

I keep the documents...

Company

Phone number

Reference number

I keep the documents...

### Defined benefit (final salary) ---

Company

Phone number

Reference number

I keep the documents...

Company

Phone number

Reference number

I keep the documents...



Private pension

Company

Phone number

Reference number

I keep the documents...

State pension

I am claiming state pension: Yes No

Annuity

Provider name

Policy number

I keep the documents...

Borrowing

Mortgage

Lender

Name(s) the account is held in

Credit card / store card

Issuer

Card number

Name(s) the card is held in

Issuer

Card number

Name(s) the card is held in

Loans

Loan provider

Phone number

I keep the documents...

Loan provider

Phone number

I keep the documents...

Items on finance (for example, car, or furniture)

Items bought on finance

Financing company

Phone

I keep the documents...

Items bought on finance

Financing company

Phone

I keep the documents...

## Insurances

## Life insurance

**Provider**

**Phone number**

### Policy number

**I keep the documents...**

## Home insurance (Contents insurance)

## Company

Renewal date

### Policy number

### Phone number

**I keep the documents...**

## Home insurance (Buildings insurance)

## Company

Renewal date

### Policy number

### Phone number

**I keep the documents...**

## Car insurance

## Company

Renewal date

**Policy number**

**Phone number**

**I keep the documents...**

## Other insurances

There are many more insurance products that you might have, so please use the space below as well as the additional note space on p.22 to note down the provider, policy number, renewal date, contact details and where you keep the documents.

Utilities

Gas

Provider

Phone

Account number

Electric

Provider

Phone

Account number

Water

Provider

Phone

Account number

Broadband

Provider

Phone

Account number

TV

Provider

Phone

Account number

Mobile

Provider

Phone

Account number

Local council

Provider

Phone

Account number

Benefits

Use the space below to list any benefits that you currently receive:

Regular payments and subscriptions

Many of us will have a number of regular payments or subscriptions, whether it's for Netflix, charitable contributions, magazine subscriptions or a contact lense order. Use the space below to list any regular payments or subscriptions you have, the company that provides it, their contact detail and the payment type (standing order or direct debit):

Significant possessions

Use this section to outline anything you own that has significant financial value. This will help whoever you've assigned as Executor to understand the value of your estate and whether you might need to pay any Inheritance Tax.

Property

Address of the property

I keep the deed...

Vehicles

Make

Model

Registration

Tax renewal date

Valuable items

This could be anything from jewellery to art or electronics. Use this section to list any items, give a rough idea of their value and where you keep them.

Other financial notes and information

Use this section to add any extra information you think is important concerning your finances that didn't fit in the earlier sections, or wasn't covered.



Everything else

While this organiser aims to cover all the key things that you might want to document, there may be other information that you want your loved ones to know.

For example, something you might want to think about noting down anything that hasn't already been covered or elaborate on anything you didn't have room to detail elsewhere.

Another thing you might want to make note of is if you have a pet, you might want to outline what arrangements you would like to be made for them, or if there are any additional documents you want you loved ones to see and read, then let them know what they are where they can be found here.

There is no right or wrong when it comes to what to include in this section, so feel free to use it however you like.

Digital legacy

Your digital legacy is essentially the information about you that is online. This is something that is becoming more relevant as technology becomes an increasingly large part of our lives. It may be that you have digital assets like music libraries or blogs, or maybe you just have your social media accounts, but regardless it helps to write down what you want to happen to your accounts when you've gone.

Use the space below to outline what you want to happen to your online accounts once you've gone. Start by listing all of the accounts you can think of and the username and/or email address associated with it. Then note down what you want to happen to this account, whether that's leaving it for a memorial, passing it on to someone (for example, if you had a cloud file of family photos you might want to give someone access) or whether you want it closed down.

Don't be tempted to write down the passwords for each of these accounts. For the majority of your accounts, your executor will be able to contact the relevant companies and ask them to action your wishes, whatever they may be. You might also consider using a password manager, which can store all of your passwords securely under one master password, which you can give to someone you trust.

## Your digital legacy

## Notes

Use this section to make any notes you think might be important or useful for your loved ones.

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