



Peace of mind planner

Our lives are scattered with paperwork and digital records. In addition, most of these are not kept in the same place, let alone in some sort of order that makes them accessible to others when they need them most; such as when we are extremely ill or have died.

At Dorothy House, we have witnessed first-hand the additional stress this places on loved ones when things are already fraught with emotion. Our advice would always be to get things in order and be prepared. We hope that this booklet will facilitate and ease the process. It should also encourage some of the trickier conversations we all leave until we are pushed to have them. The booklet is designed to help you to record and easily access important life information. You have the ability to write down things like what spiritual or cultural beliefs you hold, where you keep your will, who will look after your children and/or pets, who your gas supplier is etc. You can also list where all your important documents are stored and what your final wishes would be.

when complete of

Contents

This is your own personal booklet. Once you have completed it, it is important to ensure that the booklet is stored in a safe, but accessible place and that someone you trust knows where it is. It is also a good idea to look at it occasionally as we all know that situations and information change over time. Updating it as life progresses will stand you in good stead.

Dorothy House Hospice Care

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Registered Charity Number 275745

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Personal information

This section is for you to enter details about your immediate family, close friends and pets. It is always sensible to confirm that the details you record here are correct. In a fast-paced world, things change so keeping track of up-to-date details is good practice.

Your details	Spouse/partner/civil partner or next of kin
Title:Forename/s:	Title: Forename/s:
Surname:	Surname:
Preferred pronoun:Date of birth://	Date of birth://
Address:	Address:
Postcode:	Postcode:
Telephone number:	Telephone number:
Mobile number:	Mobile number:
Email:	Email:
National Insurance number:	
Legal status:	

Children/parents/dependents/close family Children/parents/dependents/close family Title: _____ Forename/s: _____ Title: Forename/s: _____ Surname: _____ Surname: Date of birth: / / Date of birth: / / Address: _____ Address: _____ Postcode: _____ Postcode: _____ Telephone number: _____ Telephone number: Mobile number: Mobile number: _____ Email: Email:

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Address books or contact lists are kept	Microchip: O Yes O No Microchip number:
	Special needs?
My key safe holders are the following:	Vet details: (name/telephone number/address)
Name:	
Contact details:	
Name:	Where are the vaccination records held?
Contact details:	Pet insurance details:
Pets	Wishes in case of an emergency:
Name:	
Breed:	
Colour description:	
Date of birth:	
Male/female:	

Medical information

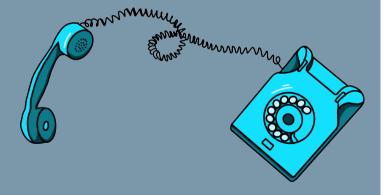
Are you taking any medication? OYes ONo	Allergies? O Yes O No
If yes, please provide the information below:	Details:
Medication name:	
Dosage:	_ Do you have a pace maker or similar appliance fitted?
When is it taken?	_ O Yes O No
Reason for taking it:	Details:
Where is the medication kept?	
Details of any illness or drug therapy that could affect	Are you registered as an organ donor? O Yes O No
emergency treatment:	Where is your card kept?
	Have you completed a ReSPECT (Recommended Summary Plan for Emergency Care and Treatment) or STEP (Somerset Treatment Escalation Plan and Resuscitation Decision) or any other Advanced Care Planning form? OYes ONo
	If yes, where is the document kept?
	_

Contacts

Our lives are often made up of several contacts. These can be people like your doctor and spiritual advisor. Having all these names in one place can be very helpful.

Other useful contacts could include your employer, voluntary work details or even club memberships.

Whilst you record these details, it might be good to make sure you record your utility company emergency details as well as those of the local police. One book with all these details will make life simpler.



Key health contacts: (E.g. doctor, district nurse, pharmacist		
Contact 1		
Type: Name:		
Telephone number:		
Address:		
Postcode:		
Contact 2		
Type: Name:		
Telephone number:		
Address:		
Postcode:		
Contact 3		
Type: Name:		
Telephone number:		
Address:		
Postcode:		

Other useful contacts

This could be your gas emergency number or local police for example. You can also include the contact details for your mosque/synagogue/temple/church as each may have a special committee that supports their communities after a death.

Useful contact 1	Useful contact 3
Type: Name:	
Telephone number:	Telephone number:
Address:	Address:
Postcode:	Postcode:
Useful contact 2	Useful contact 4
Type: Name:	
Telephone number:	Telephone number:
Address:	Address:
Postcode:	Postcode:

Day-to-day contacts

In this section, we suggest that you record a list of contacts that are important in your day-to-day life. E.g.

- Work contacts
- Home contacts (such as a cleaner/meals on wheels/carers)
- Local traders (gardener/milk delivery)
- Organisation contacts (trustee of a trust/ clubs/memberships/unions/library)
- Utility providers (gas/electricity/water/telephone/ mobile phone/internet/satellite)
- Other (solicitor/account/broker/spiritual leader)

Day-to-day contact 1

Type:	_Name:
Telephone number:	
Address:	
	_Postcode:
Day-to-day contact 2	
Type:	_Name:
Telephone number:	
Address:	
	Postcode:

Day-to-day co	ontact 3
---------------	----------

Type:	_Name:
Telephone number:	
Address:	
	Postcode:
Day-to-day contact 4	
Type:	_Name:
Telephone number:	
Address:	
	Postcode:



LifeLedger is a helpful end of life planning and account closure service.

www.lifeledger.com

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

www.gov.uk/after-a-death/organisations-you-need-to-contact-and-tell-us-once





Documents

During our lives, we collect many legal documents such as birth, marriage and civil partnership certificates. There are deeds to our home and wills as well. Recording the whereabouts and existence of these is very helpful for family, and when the time comes, your deputy under a Lasting Power of Attorney, and an executor under a will.

Document and location

0	Birth certificate:
0	Marriage/Civil partnership certificate:
0	Deeds to your property:
0	Driving licence:
0	Television licence:
0	National Insurance card:
0	NHS card:
0	Medical Exemption card:
0	Bus pass:
0	Travel card:
0	Gun licence:
0	Other:

Do you have a pension?	Do you
Company name:	
Reference number:	
Location of document:	Your la
Do you have life insurance?	This is
Company name:	
Policy number:	-
Location of document:	
Do you have a funeral plan?	Once y a gift in
Company name:	
Policy number:	
Location of document:	informa will info
O Please see 'Other Contacts' on page 9 for my	more a
religious/cultural support contact details.	At Dor

Do you receive any benefits?

Your last will and testament

This is one of the most important documents you will ever complete. It allows you to decide what happens to your assets and possessions when you die. If you have children under age 18, it allows you a voice in who will be their guardian/s. Having a valid will can save enormous distress and sometimes, unnecessary expense, when you die.

Once you have provided for your family and friends, leaving a gift in your will to charity can be a lovely way to leave a legacy that makes a difference. Even a gift of just 1% of your estate counts. Sometimes, a gift to charity can also reduce your Inheritance Tax burden as well. On the Dorothy House website **www.dorothyhouse.org.uk** we have useful information on will writing. You are also able to download a will information leaflet; and, you can call **01225 721480** for more assistance.

At Dorothy House, one in five of our patients is cared for with thanks to gifts in wills.

Letter of Wishes

A letter of wishes is a document drawn up to accompany your will. However, unlike your will, a letter of wishes is not legally binding, instead, it provides guidance to the individuals dealing with your estate and/or any trusts after your death.

In this letter, you may also wish to consider leaving a donation to Dorothy House or another charity of your choice.

For more information on Ethical Wills please see 'Final Messages' on page 30.

Lasting Power of Attorney

This is another important document, which allows you to appoint a trusted person/s to act on your behalf if you are unable to make certain decisions for yourself. There are two different types of Lasting Powers of Attorney – Property & Finance and Health & Welfare.

Living wills, advance decisions, advance statements or advance directives

All these documents state your wishes should you become unable to voice or express yourself. The advantage of these documents is that they allow those people involved in your care the confidence that they are making the decisions that you would have chosen for yourself, had you been able.



Please keep these documents in a safe place and up to date

Will	Property & Finance (or you may have the old, but still legal Enduring Power of
Location:	Attorney)
Nominated executors:	Location:
	Deputies and their contact details:
Nominated guardians:	
Lasting Power of Attorney	la it radiatorad?
Health & Welfare	Is it registered?
Location:	
Deputies and their contact details:	
Is it registered?	

Property and possessions

Most of us have some possessions. Having a list of any sentimental or valuable items you own can be useful. You can also record if there is any paperwork associated with them.

In this section, you can note details about property, vehicles and significant items.



Main property:

Address:
Postcode:
Are you the owner or tenant?
If you are the owner, is there a mortgage? O Yes O No
If you are the owner, is there equity release on the property?
How do you own this property? (I.e. sole owner, joint owners or tenants in common)
If the property is a flat, is there a management company?
Where are the property documents kept?

If you are a tenant:	Vehicle 1:
Who is your landlord or agent?	Name of keeper:
	Make and model:
Contact details:	Registration number:
	Vehicle documents location:
Second property:	Garage or parking permits:
Address:	Vehicle 2:
Postcode:	Name of keeper:
Mortgage:	Make and model:
Tenant in place?	
Tonaric III piaco .	Vahiala da ayraanta la aatian
	Garage or parking permits:

Significant possessions

These can include items such as antiques, furniture, glassware, jewellery, rugs, paintings, clocks, books, photographs and letters/cards.

Letting people know which hold monetary value or sentimental value can be very helpful so that these items are cared for and kept safely.

Items of sentimental value:

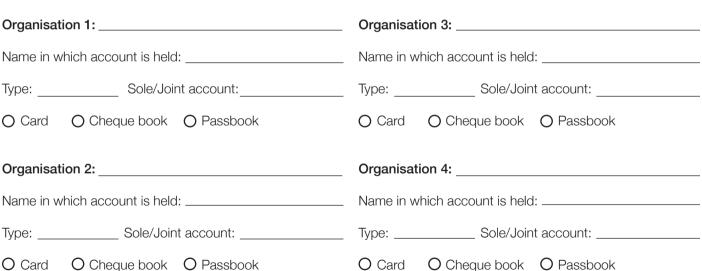
1.	
3.	
Ite	ms with monetary value:
1.	
2.	
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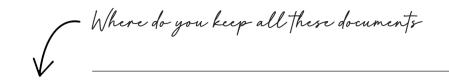


Financial

This section should be used to record all your financial information in one place. It will help you to consolidate your financial arrangements and help your Attorneys (nominated in your Lasting Powers of Attorney) to look after your affairs if needs be.

IMPORTANT - please do not record any PIN numbers or security information of any sort in this booklet.





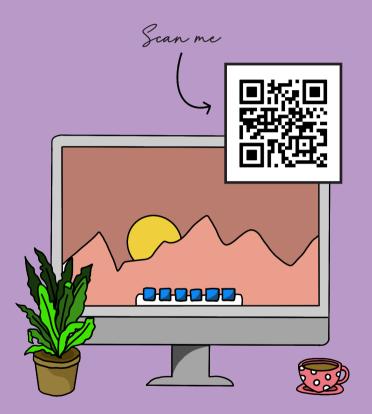
Pension, shares, endowment and life insurance policies	Insurance policies for home contents, buildings
Organisation 1:	and vehicles
	Home contents
Type: Ref number:	Organisation/ref number:
	Building
Organisation 2:	Organisation/ref number:
	Motor
Type: Ref number:	Car 1:
Organisation 3:	Organisation: Ref number:
Organisation o.	Car 2:
Type: Ref number:	Organisation: Ref number:

Digital assets

As we spend more and more time online, it is becoming increasingly important to consider what will happen to our digital estate in a similar way to how we address our physical estate. As advised by The Law Society, 2014 – "People should leave clear instructions about what should happen to their social media, computer games and other online accounts after their death"

There are many things to consider such as, for platforms that hold photography, any sentimental photographs need to be saved elsewhere before deactivating an account and subscriptions will need to be cancelled properly to avoid any additional charges.

Please scan the QR code to visit our Digital Legacy web page for more information.



Suggested digital assets

Use these suggestions to fill out the accounts on the next page.

Device passwords

- Laptop
- Phone
- Tablet

Social media accounts

- Instagram
- Facebook (inc Facebook messenger)
- Snapchat
- WhatsApp

Email accounts

Gmail

Money

- Paypal
- Betting or gaming accounts
- eCommerce/second-hand selling sites (Vinted/ Depop/Etsy)

Photo sharing and editing platforms

- Pinterest
- Photoshop

File sharing platforms

- Google Drive
- iCloud

Music, podcasts and entertainment

- Spotify
- Netflix
- Amazon Prime

Other

- Own website or personal blog
- Work associated devices (phone, laptop, tablet)



Account 1:	Account 3:
Username:	Username:
Email*:	Email*:
Password:	Password:
Two-factor authentication**:	Two-factor authentication**:
Account 2:	Account 4:
Username:	Username:
Email*:	Email*:
Password:	Password:
Two-factor authentication**:	Two-factor authentication**:

^{*} Associated with the account ** Any email address and/or mobile number affiliated with this account

Rites and rituals

Please provide as much information on the rites or rituals that are important to you at the end of your life. These instructions can be so helpful and allow those taking care of you to support your journey sensitively.

Final wishes

Fittingly this last section provides you with the space to express your wishes and thoughts for your funeral/celebration service and any final requests.

- O I am setting out my funeral wishes in this booklet
- O I have already set out my funeral wishes

It is my wish that my funeral is in line with my religious/ spiritual beliefs and I will leave any instructions and wishes below:

Many people find talking about this very difficult, but this process and expression of wishes helps your family and loved ones know what arrangements you would like. Knowing they are carrying out your wishes can provide great comfort at a time of grieving.

Funeral wishes

Starting to think about your own funeral may not be easy. It is not essential for there to be a funeral service. There are several companies who provide a dignified cremation, with no mourners present. This type of funeral is cheaper than a conventional one. If you would like there to be a funeral service, often it is helpful to start considering what might seem, or feel, fitting. Such as where you would like it to be, who you would choose to be present (or not), readings, music and the service leader.

Ideas may include music, songs, prayers or readings that meant something to you. You might like to think about whom you would want to read or share some thoughts about you and your life.

As you go through the next few pages, tick or complete as much as you can. If you are not quite sure, then do not worry. You can always come back to it. The more information that you share now, will help your loved ones in the future. If you do not have set feelings or preferences then simply state that.

Medical science

death in order to make the necessary arrangements.
Organisation:
Name:
Contact number:
Do you carry an Organ Donor Card? O Yes O No
Funeral director/support through your religious/ spiritual community
I have already paid for a Funeral Plan: O Yes O No
If yes, please share details:

If you have planned to donate your body to medical

Service	Burial
Religion/spiritual belief or philosophy:	Have you arranged a burial plot? O Yes O No
Would you like an after death service? O Yes O No	If you have then please share the details:
Would you like a committal at the graveside or crematorium? O Yes O No	
Would you like to be buried or cremated?	
Where would you like this to be held? Do you have a preference which funeral directors are used? O Yes O No	Where are the documents?
If yes, please record the name and contact details below:	Contact details:
	If you have not made any pre-arrangements, where would you like to be buried?

Cremation

I would like to be cremated at:	I would like my coffin to be:	
O I do not mind where I am cremated.	(For example: wood/traditional or wicker/cardboard etc)	
I would like my ashes to be:	Before the service, I would like my body to rest:	
	O At home	
O Buried	O At the funeral home	
○ Scattered	O At the church or other religious/spiritual place	
O Interred	O Other:	
O Kept		
Please provide details for your choice (i.e. location) or if you would like to allow your loved ones to decide:	I would prefer my body being embalmed (if possible): O Yes O No	
	I would like my body to be dressed in:	

O I have no preference as to my death announcement
O I do not wish to have a death announcement
I would like the following family and friends to be asked if they would be willing to take part in my service:
Name:
Contact details:
Wished for role: (e.g. coffin bearer, reading etc) Name: Role:
Name:
Role:
Name:

Flowers & Donations	I would/would not prefer a different type of commemoration
Would you like flowers at your funeral? O Yes O No	such as a tree planted, park bench or a donation to a chosen charity:
If yes, please suggest some of your favourites:	
I would wish for any donations made to go to the following	
charities:	Other wishes: These can be requests, cultural and religious requirements
If donations are able to be made, please ensure that there are gift aid envelopes available as well.	and customs that have not been covered above.
After the service I would like my family and friends to join or gather at:	
I would/would not like a memorial stone of the following type and with the suggested words:	I have made financial provision for these arrangements and wishes. O Yes O No If yes, please share the details below:

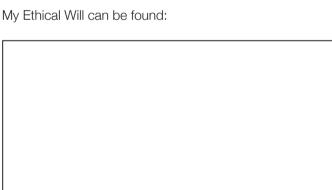
Ethical Wills

An Ethical Will is traditionally addressed to one's children. It is written to share values, wisdom, family history, stories, life-lessons and love. It is a gift from one generation to another. You may wish to leave such a document as it is a very personal way to be remembered. The writing is intended to be spiritual in nature.

You can find some examples of Ethical Wills at www.life-legacies.com

Wikipedia has a clear description of Ethical Wills and their purpose.

Do you have an Ethical Will? O Yes O No



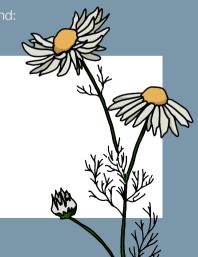
Final Messages

It is time to think about whether you might like to leave a message for your loved ones. So many of us leave things unsaid. If you ever think 'I wish I had told them', 'I wish I had asked' or 'I wish we had talked about...,' then it might be worth considering leaving a message.

Sometimes these things can be very difficult to say in person, but they are so important to say. Many choose to leave a letter, a recording or even a film.

Providing something like this could provide enormous comfort after you have died and leave your loved ones with a treasured record of you.

My final message can be found:



My Notes	

How can we help?

Please contact your Dorothy House professional if you have any further questions or concerns.

Registered Charity No. 275745



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dorothyhouse.org.uk

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