



PEACE OF MIND PLANNER





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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.

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
Winsley
Bradford on Avon
Wiltshire
BA15 2LE

Registered Charity Number 275745

91
when Tick complete

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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

Title: Forename/s:

Surname:

Preferred pronoun: Date of birth:

Address:

Postcode:

Telephone number:

Mobile number:

Email:

National Insurance number:

Legal status:

Spouse/partner/civil partner or next of kin

Title: Forename/s:

Surname:

Preferred pronoun: Date of birth:

Telephone number:

Mobile number:

Email:





Children/parents/dependents/close family

Title: _____ Forename/s: _____

Surname: _____

Preferred pronoun: _____ Date of birth: _____

Address: _____

Postcode: _____

Telephone number: _____

Mobile number: _____

Email: _____

Children/parents/dependents/close family

Title: _____ Forename/s: _____

Surname: _____

Preferred pronoun: _____ Date of birth: _____

Address: _____

Postcode: _____

Telephone number: _____

Mobile number: _____

Email: _____

Address books or contact lists are kept...

My key safe holders are the following:

Name:

Contact details:

Name:

Contact details:

Pets

Name:

Breed:

Colour description:

Date of birth:

Male/female:



Microchip: Yes No Microchip number:

Special needs?

Vet details: (name/telephone number/address)

Where are the vaccination records held?

Pet insurance details:

Wishes in case of an emergency:

After my death, I wish for my pets to be cared for as follows:

Medical information

Are you taking any medication? Yes No

If yes, please provide the information below:

Medication name: _____

Dosage: _____

When is it taken? _____

Reason for taking it: _____

Where is the medication kept? _____

Details of any illness or drug therapy that could affect
emergency treatment:

Allergies? Yes No

Details: _____

Do you have a pace maker or similar appliance fitted?

Yes No

Details: _____

Are you registered as an organ donor? Yes No

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 Advance
Care Planning form? Yes No

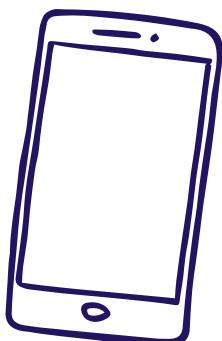
If yes, where is the document kept?

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.



(E.g. doctor, district nurse, pharmacist)

Key health contacts:

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

Type: _____ Name: _____

Telephone number: _____

Address: _____

Postcode: _____

Useful contact 2

Type: _____ Name: _____

Telephone number: _____

Address: _____

Postcode: _____

Useful contact 3

Type: _____ Name: _____

Telephone number: _____

Address: _____

Postcode: _____

Useful contact 4

Type: _____ Name: _____

Telephone number: _____

Address: _____

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 contact 3

Type: _____ Name: _____

Telephone number: _____

Address: _____

Postcode: _____

Day-to-day contact 4

Type: _____ Name: _____

Telephone number: _____

Address: _____

Postcode: _____

USEFUL TIPS

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

www.lifeledger.com

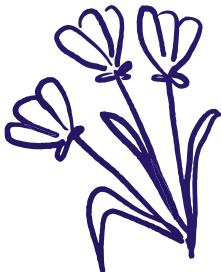
Tell Us Once is a service that lets you report a death to most government organisations in one go.

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 attorney under a Lasting Power of Attorney, and an executor under a will.



Tick the documents you have

DOCUMENT AND LOCATION

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

Do you have a pension?

Company name:

Reference number:

Location of document:

Do you have life insurance?

Company name:

Policy number:

Location of document:

Do you have a funeral plan?

Company name:

Policy number:

Location of document:

Please see 'Other Contacts' on page 9 for my religious/cultural support contact details.

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 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, approximately 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

Location: _____

Nominated executors: _____

Nominated guardians: _____

Lasting Power of Attorney

Health & Welfare

Location: _____

Deputies and their contact details: _____

Is it registered? _____

Property & Finance

(or you may have the old, but still legal Enduring Power of Attorney)

Location: _____

Deputies and their contact details: _____

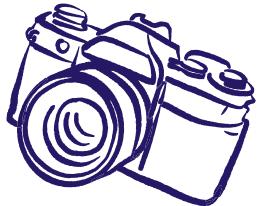
Is it registered? _____



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? Yes 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:

Who is your landlord or agent?

Contact details:

Second property:

Address:

Postcode:

Mortgage:

Tenant in place?

Vehicle 1:

Name of keeper:

Make and model:

Registration number:

Vehicle documents location:

Normal service station:

Garage or parking permits:

Vehicle 2:

Name of keeper:

Make and model:

Registration number:

Vehicle documents location:

Normal service station:

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. _____

2. _____

3. _____

Lasting Power of Attorney

1. _____

2. _____

3. _____

It may be helpful to consider which unwanted items might be able to be donated to your local charity shops

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.

Organisation 1:

Name in which account is held:

Type: Sole/Joint account:

Card Cheque book Passbook

Organisation 2:

Name in which account is held:

Type: Sole/Joint account:

Card Cheque book Passbook

Organisation 3:

Name in which account is held:

Type: Sole/Joint account:

Card Cheque book Passbook

Organisation 4:

Name in which account is held:

Type: Sole/Joint account:

Card Cheque book Passbook

Where do you keep all these documents



Pension, shares, endowment and life insurance policies

Organisation 1: _____

Type: _____ Ref number: _____

Organisation 2: _____

Type: _____ Ref number: _____

Organisation 3: _____

Type: _____ Ref number: _____

Insurance policies for home contents, buildings and vehicles

Home contents

Organisation/ref number: _____

Building

Organisation/ref number: _____

Motor

Car 1: _____

Organisation: _____ Ref number: _____

Car 2: _____

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.



Scan me




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)

Fill me



Account 1:

Username:

Email*:

Password:

Two-factor authentication**:

Account 2:

Username:

Email*:

Password:

Two-factor authentication**:

Account 3:

Username:

Email*:

Password:

Two-factor authentication**:

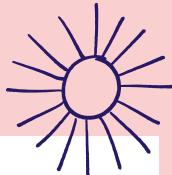
Account 4:

Username:

Email*:

Password:

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.

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

Where is this document kept? (It is good to note that not all wills are accessed and read prior to a funeral)

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

If you have planned to donate your body to medical science, please note here who should be notified of your death in order to make the necessary arrangements. Make and model:

Organisation: _____

Name: _____

Contact number: _____

Do you carry an Organ Donor Card? Yes No

Funeral director/support through your religious/spiritual community:

Do you carry an Organ Donor Card? Yes No

If yes, please share details:

Service

Religion/spiritual belief or philosophy: _____

Would you like an after death service? Yes No

Would you like a committal at the graveside or
crematorium? Yes 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? Yes No

If yes, please record the name and contact details below:



Burial

Have you arranged a burial plot? Yes No

If you have then please share the details:

Where are the documents? _____

Where is the plot? _____

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 do not mind where I am cremated.

I would like to be cremated at:

Buried

Scattered

Interred

Kept



Please provide details for your choice (i.e. location) or if you would like to allow your loved ones to decide:

I would like my coffin to be: (For example: wood/traditional or wicker/cardboard etc)

Before the service, I would like my body to rest:

At home

At the funeral home

At the church or other religious/spiritual place

Other:

I would prefer my body being embalmed (if possible):

Yes No

I would like my body to be dressed in:

I would like to request the route taken to the service or cremation: Yes No

I would like my service to be conducted by:

Name:

Contact details:

I would like to request (if possible) the following at my service:

Music/songs played/songs sung:

Readings:

Prayers:

I would like my death to be announced in the following publications:

I have no preference as to my death announcement

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:

Role

Flowers & Donations

Would you like flowers at your funeral? Yes No

If yes, please suggest some of your favourites:



I would wish for any donations made to go to the following charities:

If donations are able to be made, please ensure that there are gift aid envelopes available as well.

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 would/would not prefer a different type of commemoration such as a tree planted, park bench or a donation to a chosen charity:

Other wishes:

These can be requests, cultural and religious requirements and customs that have not been covered above

I have made financial provision for these arrangements and wishes. Yes 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? Yes No

My Ethical Will can be found:

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:

HELLO

I hope that you have found our booklet helpful. If after going through it, or talking with your loved ones, you would like any further support with getting your affairs in order, drafting your will, updating your will, leaving a gift to charity, or even just talking about how you go about any of this, please contact me.

I would be very happy to have a chat with you; and you would be more than welcome to come to Winsley House and have coffee with me.

All conversations will be treated as confidential and with no obligations.

I hope to meet you,

Sarah

Sarah Dodd
Head of Legacies



ABOUT US

We are an adult hospice covering an approximate 800 sq mile patch across B&NES, parts of Wiltshire and Somerset.



4,254
people cared for



This is made up of patients, their families and carers.



More than

90%

of our care takes place out in the community - in peoples houses, residential homes or healthcare settings such as hospitals and GP surgeries.



We have 27 high street shops across our patch.



16,524 pairs of shoes were sold in these shops last year.

We have almost 1,300 volunteers supporting our work across all areas of the Hospice.

Based on FY24/25 figures

DOROTHY HOUSE IS A CHARITY

Only 30% of our care is paid for by the NHS.

Each year approx. 20% of our patients are cared for with thanks to gifts in wills.

DID YOU KNOW?



It costs around £1,500 annually to provide the resources used in our Creative Therapy sessions, allowing loved ones to spend time together making lasting memories and precious keepsakes.



It costs £6,000 to provide around four weeks of overnight care in a person's home, here in your community.

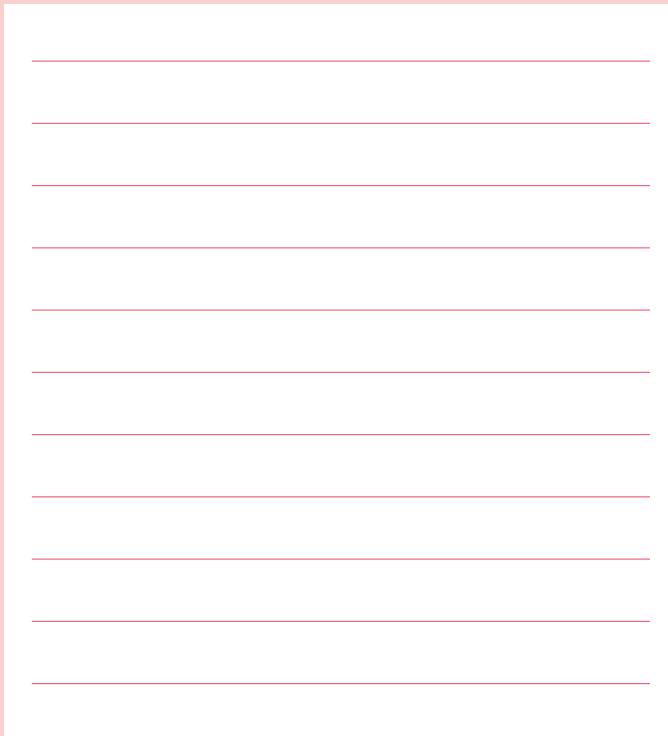


It costs £25,000 to provide 25 nights of care for one person on our Inpatient Unit at Winsley, allowing our staff to offer respite and symptom control in a safe and caring setting.



It costs approximately £75,000 to fund our Family Support Team for one month, offering pre and post bereavement support to the families, friends and carers of people who have died under our care.

MY NOTES



A white rectangular area for notes, featuring ten horizontal red lines spaced evenly apart for writing.



A white rectangular area for notes, featuring ten horizontal red lines spaced evenly apart for writing.



HOW CAN WE HELP?

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



dorothyhouse.org.uk

Dorothy House
Winsley, Bradford on Avon, BA15 2LE
Switchboard: 01225 722 988
Clinical 24hr Advice Line: 0345 0130 555

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