



**Christies
Care**

Est. 1987

LIVING INDEPENDENTLY
AT HOME

My DOCUMENTS

AN AIDE-MEMOIRE OF WHAT I OWN AND WHERE IT CAN BE FOUND

My Documents



Important things like the Will, share certificates, bank account details, life assurance plans will need to be accessed shortly after death.



The death of a close family member or friend is always a traumatic time for those left behind. It is often made more difficult for those relatives or friends who have been asked to be executors and handle the estate because they have difficulty in finding the key documents and other important information that belonged to the deceased.

Important things like the Will, share certificates, bank account details, life assurance plans will need to be accessed shortly after death.

Quite apart from making the job harder for the executors, it is possible that some assets may go undetected. For example, you may have a paid-up life assurance plan – in other words, a plan where there are no more premiums payable but which still provides benefits.

If the plan documentation has been lost, or is hidden away somewhere, how will the executors know?

Insurance companies hold approximately £400 million of unclaimed monies in life assurance and pension plans that belong to planholders[†], the vast majority of whom will have died.

Their families have no knowledge of the plan and so the money will be lost to them.

The position is similar with UK banks. There is over £1 billion of unclaimed monies held by National Savings and Investments (excluding premium bonds) for missing account holders[†].

Although the banks and other financial institutions do their utmost to trace account holders and repay this, a significant amount of client funds lie unclaimed.

[†] *The Unclaimed Assets Register 2016*

Clearly, you can make it much easier if your affairs are in good order and your family and friends don't have to search high and low for documents that they don't know even exist.

It also means that your heirs will receive the full inheritance that you intended for them more quickly than if someone has to search for assets.

Christies Care Checklist

To help you do this, we have created the Christies Care Asset Checklist. This will enable you to keep track of all your assets and, specifically, to let your family know where they are kept.

We have also included a Key Contacts Checklist which enables you to list the details of your important advisors, such as your solicitor, accountant and financial advisor.

Once you have completed the checklist, take a copy for the key members of your family.

In addition, the following websites may be of help to anyone dealing with an estate.

- www.direct.gov.uk
- Step-by-step guide on what to do after death: www.theprobateservice.gov.uk
- Expansion of probate and the 'Probate Service': www.citizensadvice.org.uk

MY DETAILS:

Name:	
National Insurance Number:	
Tax Reference:	
Date of Birth:	

KEY CONTACTS:

	NAME AND ADDRESS	CONTACT
Solicitor:		
Accountant:		
Doctor:		
Tax Office:		
Employer:		
Others:		

MY WILL:

Your Will is an important document containing instructions about how you want your estate to be administered after your death. It is of vital importance that your Will is stored in a safe and secure place so that your loved ones know where to locate it and to ensure that it meets all the necessary legal requirements when presented to the Probate Office.

The original of my Will is held with:	
The Will is dated:	
The Will was drawn up by:	
My Executors are:	

CLAIMING THE TRANSFERABLE NIL RATE BAND:

When an individual who has been previously married or in a civil partnership dies, a claim can be made to transfer the nil rate band, where any part of it was unused, from the spouse or civil partner who died first.

The following documents will be needed in support of such a claim. *Please use this section to record their location.*

Copy of Grant of Representation (Confirmation in Scotland) of deceased spouse / civil partner:	
Will of deceased spouse / civil partner:	
Any Deed of Variation or disclaimer in respect of property inherited from a deceased spouse / civil partner:	
Death certificate of deceased spouse / civil partner:	

MEDICAL INTERVENTION:

Is there an ACP? (Advanced Care Plan)	YES <input type="radio"/>	NO <input type="checkbox"/>	Located at:
Is there a DNR order? (Do Not Resuscitate)	YES <input type="radio"/>	NO <input type="checkbox"/>	Located at:
Has an advanced decision to refuse treatment been fully completed?	YES <input type="radio"/>	NO <input type="checkbox"/>	Located at:

POWERS OF ATTORNEY:

DATE MADE	NAME AND ADDRESS OF ATTORNEYS	HAS IT BEEN REGISTERED? YES/NO	NAMES AND ADDRESSES OF INDIVIDUALS TO BE NOTIFIED OF ANY APPLICATION TO REGISTER THE EPA/LPA

BANK / BUILDING SOCIETY ACCOUNTS: *(Including Online Accounts)*

BANK / BUILDING SOCIETY (NAME AND ADDRESS OF BRANCH)	SORT CODE	ACCOUNT NO.	CONTACT

CREDIT CARDS: *(Including Online Accounts)*

CREDIT CARD COMPANY	ACCOUNT NO.	CONTACT

LOANS:

COMPANY	ACCOUNT NO.	CONTACT

MY ASSETS:

INVESTMENT BONDS / UNIT TRUSTS	INVESTMENT DETAIL	PLAN NO. / ACCOUNT NO.	CONTACT

INDIVIDUAL SAVINGS ACCOUNTS: (aka ISAs)

ISAs	INVESTMENT DETAIL	PLAN NO. / ACCOUNT NO.	CONTACT

MY ASSETS: (Continued)

SAVINGS AND LIFE ASSURANCE / PLANS	INVESTMENT DETAIL	PLAN NO. / ACCOUNT NO.	CONTACT

STOCKS AND SHARES

STOCKS AND SHARES	INVESTMENT DETAIL	PLAN NO. / ACCOUNT NO.	CONTACT

MY ASSETS: *(Continued)*

OTHER ASSETS EG. PREMIUM BONDS NATIONAL SAVINGS BONDS	INVESTMENT DETAIL	PLAN NO. / ACCOUNT NO.	CONTACT

COMMENTS / NOTES

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MY PENSIONS:

PROVIDER (NAME AND ADDRESS)	LATEST PLAN VALUE	PLAN NUMBER	CONTACT

COMMENTS / NOTES

MY PROPERTY:

TYPE	ADDRESS	APPROXIMATE VALUE	OWNERSHIP	OUTSTANDING LOAN
Main Residence				
Other Property				

MISCELLANEOUS INFORMATION (*Details of Organisations and Clubs*):

NAME	MEMBERSHIP NO	CONTACT

BENEFICIARY CONTACT DETAILS:

NAME	ADDRESS	TELEPHONE NUMBER / EMAIL ADDRESS

ADDITIONAL INFORMATION (*i.e. Utilities, Household Insurance, Subscriptions*):

NAME	MEMBERSHIP NO	CONTACT

FUNERAL ARRANGEMENTS *(The Service)*:

The death of someone special can be a time of great stress, as well as distress, for the bereaved. We can lessen that stress for those we leave behind by making our wishes for our funeral known beforehand. With this in mind the following chart may be of help.

Remember, we do not have to complete all or indeed any of the questions asked. However, the more you are able to answer, the greater the assistance you will be giving to your next of kin.

Cremation?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	
If yes to above:			
Ashes interred?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	If yes: where? <i>(legal restrictions will apply)</i>
Ashes scattered?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	If yes: where? <i>(legal restrictions will apply)</i>
Burial?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	If yes: where? <i>(legal restrictions will apply)</i>

Service in Church?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	
If yes, which Church:			

The Service			
Music at entry?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	
Hymns to sing?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	
If yes, list up to three:			
1.	_____		
2.	_____		
3.	_____		
Reading?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	

Any special tribute?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	
If so by whom? _____			
Music at exit?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	_____
Any other wishes?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	_____

YOUR FAMILY TREE:

YOUR FULL REGISTERED NAME:

SPOUSE / PARTNER:

PARENTS:

GRANDPARENTS:

CHILDREN:

BROTHERS AND SISTERS:

KEY NOTES / OTHER CONNECTIONS:

OTHER INFORMATION:

Please use this section to record any additional information such as requests regarding medical research bequests, deed / safe box access etc.

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Care**

Est. 1987

Living independently at home

THE REASON TO PICK CHRISTIES CARE AS YOUR LIVE-IN HOME CARE PROVIDER OF CHOICE?

Christies Care has been inspected and rated as 'Outstanding' by the Care Quality Commission – a rating awarded to less than 3% of all care agencies or care homes. We work closely with Social Services Departments and health professionals.

Our Saxmundham based support staff of around 75 people are there to make sure that we have all the procedures working well to act quickly and efficiently on each client's behalf, including our ability to start work for a client often within 24 or 48 hours of being asked.

Over the years, we have invested heavily in creating a good environment for carers, staff and all our visitors.

We have subsidised guest rooms for our carers, and a disabled friendly en-suite guest room for clients and other visitors who want to come and stay.

Christies Care is a family owned and run live-in home care agency, established in 1987. We specialise in providing the best live-in home care to dependent adults, carefully matching personalities so that our clients have a team of carers whom they know and like.

We have grown by word of mouth and positive recommendation.

Our consistently good service to our clients and carers has enabled us to become one of the largest specialist agencies for live-in home care in the UK.

Christies Care has clients throughout the country, from Scotland to the Channel Islands and we select, recruit and train our carers to look after their clients' wishes.

Our Local Area Advisors are spread all over the UK, and visit our clients regularly, to complement the service given by our head office.

TEL: 01728 605107

EMAIL: care@christiescare.com

WEB: www.christiescare.com

FAX: 01728 604483



CHRISTIES CARE – GIVING YOU LASTING PEACE OF MIND