

The Personal Affairs Checklist (PAC) is a document produced to help you keep a concise record of your personal affairs and papers. Investing a little time now to complete the PAC could save your spouse, partner, relatives or friends a great deal of time and expense in the future.

### Who is the PAC for?

The PAC is for everybody. It is organised in three sections:

- Section 1 gives information which might be needed quickly; key advisers, the location of your will, access to internet accounts etc.
- Section 2 covers your financial affairs: assets, insurance policies, investment, pensions, mortgages and other liabilities.
- Section 3 covers other general information like your employment record, club memberships etc.

The form is designed to cover just about everyone but you need only complete those parts that are relevant to you. If you are self employed, you may wish to separately document key aspects of your business.

To complete the form you just need to tab or click through the document and type over the grey boxes. Then save or print the completed form.

Each field will stretch to contain as much or as little detail as you would like to enter, so there should be no need for you to have to use additional paper to record all your information.

### What do I do with the completed PAC?

We recommend that a copy of the form is deposited with a trusted friend or relative, or your bank, accountant or solicitor. A copy would in an case be kept with your Will. As some of the information will change from time to time, it is desirable that the PAC is kept up to date.

### What is the difference between the PAC and my Will?

The PAC is not a will and should not contain instructions about what should be done with your assets. It is a record of your key personal records, assets and papers and where they are kept.

#### Contents overview

##### Section 1

My details  
Next of Kin  
My Will  
Practical arrangements  
Advisers  
Other Advisers

##### Section 2

Bank and Building Society  
Accounts  
Other Bank Accounts  
Investments  
Credit Cards  
Insurance Policies  
Pensions  
Property - Main Residence  
Other Real Estate  
Official Documents

##### Section 3

Details of employment  
Directorships  
Interests in Family  
Companies  
Trusts of which I am a  
beneficiary  
Taxation  
Associations, clubs &  
societies  
Digital Information  
Other assets  
Other details

**Section 1**

<b>My details</b>	
Name	
Address	
Email Address	
Date Completed	
PAC held at	

<b>Next of Kin:</b>	<b>In the event of my death or incapacity due to illness contact:</b>
Name	
Relationship	
Address	
Email Address	
Telephone No.	
Name	
Relationship	
Address	
Email Address	
Telephone No.	

<b>My Will</b>	
The original of my Will is located	
The Will is dated	
It is drawn up by	
Address	
The Executors are	

<b>Practical arrangements</b>	
Preferences for Funeral arrangements	
Details of 'Living Will' declaration to family and doctors	
Wishes regarding care of dependent children	
Wishes regarding care of pets	

Power of Attorney for me is held by	
Power of Attorney is	<input type="checkbox"/> Enduring <input type="checkbox"/> Lasting <input type="checkbox"/> Ordinary
Details of Medical Research Bequests and preferences about organ donation	
My deed /safe box may be found	
The key/password can be found in a sealed envelope, cross-signed by me, held at	
The access codes to my computer are to be found in a sealed envelope, cross-signed by me, held at	

Advisers	
Accountant	
Address	
Telephone No.	
Solicitor	
Address	
Telephone No.	
IFA	
Address	
Telephone No.	
Stockbroker	
Address	
Telephone No.	
Doctor	
Address	
Telephone No.	
Other Advisers (e.g. Dentist)	
Name	
Address	
Telephone No.	
Name	
Address	
Telephone No.	

**Section 2**

**Bank Accounts** - list details of any bank or building society here

Remember to include the following details:

1. Name, address and telephone number of the bank/building society
2. Names of account holders for each account
3. Account number and sort code for each account

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**Investments** - list details of any stocks and shares, unit trusts, premium bonds and national savings certificates here.

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**Credit Cards** - list details of credit cards here.

Remember to include the following details:

1. Issuer and Type of Card
2. Credit Card Number

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**Insurance Policies** - list details of any Life, car, buildings, contents, health and travel policies here

Remember to include the following details:

1. Policy Type and Number
2. Name, address and telephone number of insurance company
3. Where to find any policy documents

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**Pensions** - list details. (If pension is a final salary pension, give details of employer. If pension is a money-purchase scheme, give details of the scheme administrator and all reference numbers)

1)  Final Salary     Money-Purchase

2)  Final Salary     Money-Purchase

3)  Final Salary     Money-Purchase

4)  Final Salary     Money-Purchase

Main Residence	
Address	
If you own the property what is the type of ownership?	<input type="checkbox"/> individual ownership <input type="checkbox"/> joint tenancy <input type="checkbox"/> tenants in common
If the property is jointly owned, give details of co-owner(s)	
The property is	<input type="checkbox"/> Freehold <input type="checkbox"/> Leasehold
Location of Deeds	
Details of Mortgage Lender	
Account Number	
Details of Management company (if relevant)	
Details of landlord if property is rented	

Other Real Estate	
Description	
Address	
If you own the property what is the type of ownership?	<input type="checkbox"/> individual ownership <input type="checkbox"/> joint tenancy <input type="checkbox"/> tenants in common
If the property is jointly owned, give details of co-owner(s)	
The property is	<input type="checkbox"/> Freehold <input type="checkbox"/> Leasehold
Details of Mortgage Lender	
Account Number	
Details of Management company (if relevant)	
Details of landlord if property is rented	
Description	
Address	
If you own the property what is the type of ownership?	<input type="checkbox"/> individual ownership <input type="checkbox"/> joint tenancy <input type="checkbox"/> tenants in common

type of ownership?	
If the property is jointly owned, give details of co-owner(s)	
The property is	<input type="checkbox"/> Freehold <input type="checkbox"/> Leasehold
Details of Mortgage Lender	
Account Number	
Details of Management company (if relevant)	
Details of landlord if property is rented	

<b>Details of any other Real Estate</b>

<b>Official Documents</b>	
My Birth Certificate may be found	
National Insurance Number	
My driving licence may be found	
Driving licence number	
My passport may be found	
Passport number	
My marriage/civil partnership certificate may be found	
Other documents relating to marriage/civil partnership may be found	

**Section 3**

<b>Details of employment</b>	
Company Name 1	
Address	
Employment Reference	
Telephone	
Please contact	
Company Name 2	
Address	
Employment Reference	
Telephone	
Please contact	

**Directorships - list company names and details**

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**Interests in family companies- list details here**

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**Trusts of which I am a beneficiary- list details here**

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<b>Taxation</b>	
Tax office address	
Tax office phone number:	
Tax reference number:	
Name and contact info for your tax adviser	

**Other Organisations - list details of any Charitable Organisations, Trade Associations, Sports Clubs, Trades Union or Professional Bodies you are involved in**  
Remember to include the following information:

1. Organisation name
2. Address and telephone number
3. Who to contact

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**Digital Information**

Details of Facebook account	
Details of Twitter account	
Details of LinkedIn membership	
Personal website address	
More information	

**Other assets** (Jewellery, wine, art)

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**Other Details**

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