

## PERSONAL AFFAIRS CHECKLIST ("PAC")

This document has been produced to assist you in keeping a concise and up-to-date note of matters relevant to your personal affairs, on the basis that this will assist your next-of-kin, other relatives or friends in the event of your incapacity or death. While it includes provision for the expression of your wishes in relation to certain matters, it is not a Power of Attorney or a Will and it should not be regarded as a substitute for either of these important documents.

The form has been designed to be of general application. There are sections that may not be applicable to you; there is also space for you to add information that is not covered by the prompts given.

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

The PAC can be downloaded, saved in electronic form or printed out. It should be easy to find when needed. You might want to provide a copy of it to one or more family members or professional advisers; alternatively you might want to leave it in an obvious but safe place. If you are a client of UHY Hacker Young you can post or e-mail a copy to us to be kept on your file.

In either electronic or paper form the PAC should be updated as appropriate. If you do make changes, ensure that you save or circulate fresh copies (and have the old ones destroyed).

If you keep the PAC in electronic form only, ensure that others can access it (leave a note of your password if necessary).



## SECTION 1

MY DETAILS	
Name	
Address	
Email address	
Date of birth	

FAMILY	
Spouse/Civil partner	
Telephone number	
Previous marriage/Civil partnership	
Name of spouse/Civil partner	
Date of death or date of divorce	
In the event of my death or incapacity please contact	
Name	
Telephone number	

MY WILL	
The original of my Will is located	
The Will is dated	
The Executors are	

## PRACTICAL ARRANGEMENTS

Preferences for funeral arrangements	
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
Location of document	
Details of Medical Research Bequests and preferences about organ donation	

## ADVISERS

Accountant	
Address	
Telephone no.	
Solicitor	
Address	
Telephone no.	
IFA	
Address	
Telephone no.	
Investment manager	
Address	
Telephone no.	

MEDICAL	
Doctor	
Address	
Telephone no.	
Dentist	
Address	
Telephone no.	

## SECTION 2

**BANK ACCOUNTS** - list details of any bank or building society here

Remember to include the following details:

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

**INVESTMENTS** - list details of any directly-held stocks and shares, unit trusts, premium bonds and national savings certificates here

**CREDIT CARDS** - list details of credit cards here

Remember to include the following details:

1. Issuer and type of card
2. Credit card number

**INSURANCE POLICIES** - list details of any life, car, buildings, contents and health policies here

Remember to include the following details:

1. Policy type and number
2. Name of insurance company
3. Where to find any policy documents

**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.	<input type="checkbox"/> Final salary <input type="checkbox"/> Money purchase
2.	<input type="checkbox"/> Final salary <input type="checkbox"/> Money purchase
3.	<input type="checkbox"/> Final salary <input type="checkbox"/> Money purchase
4.	<input type="checkbox"/> Final salary <input type="checkbox"/> Money purchase

#### MAIN RESIDENCE

Address	
If you own the property, what is the type of ownership?	
If the property is jointly owned, give details of co-owner(s)	
Location of deeds	
Name of mortgage lender	
Account number	
Details of management company (if relevant)	
Details of landlord if property is rented	

OTHER PROPERTY	
Description - 1	
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)	
Details of mortgage lender	
Account number	
Details of management company (if relevant)	
Details of landlord if property is rented	
Description - 2	
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)	
Details of mortgage lender	
Account number	
Details of management company (if relevant)	
Details of landlord if property is rented	

OFFICIAL DOCUMENTS	
National Insurance number	
Driving licence number	
Passport number	
Date of marriage/civil partnership	
Location of documents	

## SECTION 3

DETAILS OF EMPLOYMENT	
Company name 1	
Address	
Employment reference	
Telephone	
Please contact	
Company name 2	
Address	
Employment reference	
Telephone	
Please contact	

## TRUSTS

of which I am the settlor or a beneficiary - list details here

## TAXATION

Tax reference number	
National insurance number	

## DIGITAL INFORMATION

Details of Facebook account	
Details of Twitter account	
Details of LinkedIn membership	
Personal website address	
Any other information	

**RECORD OF LIFETIME GIFTS - list here**

**OTHER SIGNIFICANT ASSETS - list here**

## OTHER DETAILS

FORM LAST UPDATED ON:

## OUR SERVICES

UHY Hacker Young can assist with Inheritance Tax Planning, succession issues and estate planning generally. We can assist also with the administration of deceased estates, the completion and filing of Inheritance Tax accounts and, from our London, Letchworth, Kent and York offices, with applications for probate.

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