

## Personal Affairs Checklist

**This document has been produced to assist you in keeping a concise and up-to-date record of matters relevant to your personal affairs. The aim is to help your next of kin, other relatives or friends in the event of your incapacity or death.**

While it includes provision for recording your wishes in relation to certain matters, it is not a Power of Attorney or a Will and should not be regarded as a substitute for either of these important documents.

The form has been designed for general use. Some sections may not be relevant to you, and there is also space to add information that is not covered by the prompts provided.

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

The Personal Affairs Checklist (PAC) can be saved electronically or printed. It should be kept somewhere that is both secure and easy to locate when needed.

You may wish to provide a copy to one or more family members or professional advisers. Alternatively, if you are a client of UHY Hacker Young, you can email or post a copy to us to be retained on your file.

Whether you keep the PAC electronically or in paper form, it should be reviewed and updated whenever your circumstances change. If you make any changes, remember to replace any previous versions to ensure only the most up-to-date copy is retained.

If you keep the PAC in electronic form only, ensure that those who may need access know where it is stored and, if necessary, how to access it (for example, by leaving details of any required passwords in a secure location).

## 01 Personal information

### 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 and phone number) |  |

## My Will

The original of my Will is located

The Will is dated

The Executors are

Name of spouse/Civil partner

Date of death or date of divorce

In the event of my death or incapacity please contact (name and phone number)

## 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

☐

Enduring

☐

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.**

## 02 Financial information

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

Remember to include the following details:

- Name of the bank/building society
- Names of account holders for each account
- 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

### Bank accounts - list details of any bank or building society here

Remember to include the following details:

- Name of the bank/building society
- Names of account holders for each account
- Account number and sort code for each account

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

Remember to include the following details:

- Issuer and type of card
- Credit card number

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

Remember to include the following details:

- Policy type and number
- Name of insurance company
- 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 coowner(s)

Location of deeds

Name 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

## Other land and property

Description - 1

Address

If you own the property, what is the type of ownership?

☐

Individual ownership

☐

Joint tenancy

☐

Tenants in common

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?

☐

Individual ownership

☐

Joint tenancy

☐

Tenants in common

Details of mortgage lender

Account number

Details of management company (if relevant)

Details of landlord if property is rented

## 03 Additional information

### 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 X  
account**

**Details of LinkedIn**

**Personal website  
address**

**Any other  
information**

## Record of lifetime gifts – list here

Other significant assets – list here

## Other details

Form last updated on:



[uhy-uk.com](http://uhy-uk.com)

## UHY Hacker Young

Quadrant House  
4 Thomas More Square  
London, E1W 1YW  
Phone +44 20 7216 4600  
Email [london@uhy-uk.com](mailto:london@uhy-uk.com)

UHY Hacker Young Associates is a UK company which is the organising body of the UHY Hacker Young Group, a group of independent UK accounting and consultancy firms. Any services described herein are provided by the member firms and not by UHY Hacker Young Associates Limited. Each of the member firms is a separate and independent firm, a list of which is available on our website. Neither UHY Hacker Young Associates Limited nor any of its member firms has any liability for services provided by other members.

UHY Hacker Young (the "Firm") is a member of Urbach Hacker Young International Limited, a UK company, and forms part of the international UHY network of legally independent accounting and consulting firms. UHY is the brand name for the UHY international network. The services described herein are provided by the Firm and not by UHY or any other member firm of UHY. Neither UHY nor any member of UHY has any liability for services provided by other members.

## Helping you prosper

