

When the time comes

THINGS TO KNOW WHEN I GO



CLARUS WEALTH

CLEAR. CONFIDENT THINKING



CHAPTER 1

IMPORTANT INFORMATION

Note of caution

This document contains sensitive personal details and must be handled with utmost care. Please ensure it is kept in a secure location, such as a safe, accessible only to those people you trust and want to have this information. Your commitment to safeguarding these personal details is incredibly important in ensuring their confidentiality.

personal information

FULL NAME

KNOWN AS

CURRENT ADDRESS

PHONE NUMBERS

EMAILS

DATE OF BIRTH

PLACE OF BIRTH

NATIONAL INSURANCE NUMBER

MARITAL STATUS: SINGLE / MARRIED /
DIVORCED / WIDOWED

family members

NEXT OF KIN CONTACT DETAILS

PARTNER'S NAME & CONTACT DETAILS

CHILDREN'S NAMES & CONTACT DETAILS

OTHER IMPORTANT PEOPLE
(names, contact details and relationship)

friends/people I would like to be informed

NAMES & CONTACT DETAILS

professionals

SOLICITORS DETAILS

FINANCIAL ADVISER DETAILS

DOCTORS DETAILS

OTHERS

utilities

Utility companies generally require account numbers to provide assistance, as many will not proceed without this information. When seeking support, ensure you include the account numbers for the relevant companies, such as your gas company, water company, council tax, electricity company, window cleaner, and gardener. Having these account numbers readily available will streamline the process and ensure efficient support from each provide

PROPERTY 1 (WHERE I LIVE)

PROPERTY 2

utilities contd.

PROPERTY 3

PROPERTY 4

documents

WILL

LOCATION:

WHAT TO DO:

LPA

LOCATION:

WHAT TO DO:

TRUST DEED

LOCATION:

WHAT TO DO:

OTHER

LOCATION:

WHAT TO DO:

insurances

LIFE INSURANCE:

PROVIDER 1
POLICY NUMBER
COVER
NAME OF TRUSTEE/S

PROVIDER 2
POLICY NUMBER
COVER
NAME OF TRUSTEE/S

PROVIDER 3
POLICY NUMBER
COVER
NAME OF TRUSTEE/S

PROVIDER 4
POLICY NUMBER
COVER
NAME OF TRUSTEE/S

PROVIDER 5
POLICY NUMBER
COVER
NAME OF TRUSTEE/S

bank accounts

BANK:
ACCOUNT NAME
ACCOUNT NO.
SORT CODE
SINGLE / JOINT / BUSINESS:

BANK:
ACCOUNT NAME
ACCOUNT NO.
SORT CODE
SINGLE / JOINT / BUSINESS:

BANK:
ACCOUNT NAME
ACCOUNT NO.
SORT CODE
SINGLE / JOINT / BUSINESS:

BANK:
ACCOUNT NAME
ACCOUNT NO.
SORT CODE
SINGLE / JOINT / BUSINESS:

BANK:
ACCOUNT NAME
ACCOUNT NO.
SORT CODE
SINGLE / JOINT / BUSINESS:

BANK:
ACCOUNT NAME
ACCOUNT NO.
SORT CODE
SINGLE / JOINT / BUSINESS:

credit cards

PROVIDER:
TYPE: (VISA / MASTERCARD /
AMEX / OTHER)
ACCOUNT NAME
ACCOUNT NUMBER
SORT CODE
SINGLE / JOINT / BUSINESS:

PROVIDER:
TYPE: (VISA / MASTERCARD /
AMEX / OTHER)
ACCOUNT NAME
ACCOUNT NUMBER
SORT CODE
SINGLE / JOINT / BUSINESS:

PROVIDER:
TYPE: (VISA / MASTERCARD /
AMEX / OTHER)
ACCOUNT NAME
ACCOUNT NUMBER
SORT CODE
SINGLE / JOINT / BUSINESS:

PROVIDER:
TYPE: (VISA / MASTERCARD /
AMEX / OTHER)
ACCOUNT NAME
ACCOUNT NUMBER
SORT CODE
SINGLE / JOINT / BUSINESS:

PROVIDER:
TYPE: (VISA / MASTERCARD /
AMEX / OTHER)
ACCOUNT NAME
ACCOUNT NUMBER
SORT CODE
SINGLE / JOINT / BUSINESS:

PROVIDER:
TYPE: (VISA / MASTERCARD /
AMEX / OTHER)
ACCOUNT NAME
ACCOUNT NUMBER
SORT CODE
SINGLE / JOINT / BUSINESS:

assets

TYPE:

ADDRESS:

CO-OWNER:

YEAR OF ACQUISITION:

MORTGAGE LENDER:

ACCOUNT NUMBER:

TYPE:

ADDRESS:

CO-OWNER:

YEAR OF ACQUISITION:

MORTGAGE LENDER:

ACCOUNT NUMBER:

TYPE:

ADDRESS:

CO-OWNER:

YEAR OF ACQUISITION:

MORTGAGE LENDER:

ACCOUNT NUMBER:

TYPE:

ADDRESS:

CO-OWNER:

YEAR OF ACQUISITION:

MORTGAGE LENDER:

ACCOUNT NUMBER:

assets

NAME:
INFORMATION:

NAME:
INFORMATION:

NAME:
INFORMATION:

NAME:
INFORMATION:

NAME:
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NAME:
INFORMATION:

:

assets

NAME:
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NAME:
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NAME:
INFORMATION:

:

loans

Documenting personal loans, whether owed to financial institutions or family members, is crucial to ensure clarity and fairness. Some family members may be unaware of these loans, or your Will may not fully reflect them. However, individuals may wish for these loans to be addressed upon their death if they remain unpaid

NAME:
INFORMATION:

NAME:
INFORMATION:

NAME:
INFORMATION:

NAME:
INFORMATION:

NAME:
INFORMATION:

NAME:
INFORMATION:

investments

TYPE:
PROVIDER / BROKER:
ACCOUNT NUMBER:

TYPE:
PROVIDER / BROKER:
ACCOUNT NUMBER:

TYPE:
PROVIDER / BROKER:
ACCOUNT NUMBER:

TYPE:
PROVIDER / BROKER:
ACCOUNT NUMBER:

TYPE:
PROVIDER / BROKER:
ACCOUNT NUMBER:

TYPE:
PROVIDER / BROKER:
ACCOUNT NUMBER:

TYPE:
PROVIDER / BROKER:
ACCOUNT NUMBER:

pensions

PROVIDER:
TYPE:
POLICY NUMBER:

PROVIDER:
TYPE:
POLICY NUMBER:

PROVIDER:
TYPE:
POLICY NUMBER:

PROVIDER:
TYPE:
POLICY NUMBER:

PROVIDER:
TYPE:
POLICY NUMBER:

PROVIDER:
TYPE:
POLICY NUMBER:

PROVIDER:
TYPE:
POLICY NUMBER:

my pet(s)

PET NAME:

TYPE OF ANIMAL:

VET'S NAME:

VET'S CONTACT DETAILS

WHERE ANY PAPERWORK IS KEPT:

MICROCHIP NUMBER:

ALLERGIES / ANY IMPORTANT INFORMATION:

PET NAME:

TYPE OF ANIMAL:

VET'S NAME:

VET'S CONTACT DETAILS

WHERE ANY PAPERWORK IS KEPT:

MICROCHIP NUMBER:

ALLERGIES / ANY IMPORTANT INFORMATION:

PET NAME:

TYPE OF ANIMAL:

VET'S NAME:

VET'S CONTACT DETAILS

WHERE ANY PAPERWORK IS KEPT:

MICROCHIP NUMBER:

ALLERGIES / ANY IMPORTANT INFORMATION:

DIGITAL FOOTPRINT



01

Mobile Phone Password/ Key

02

Laptop Password/Code

03

I would like my digital footprint to continue after death/ be erased

04

Passwords/user names for social media accounts.

ORGAN DONATION

Here are my wishes for my organs



CHAPTER 2

FUNERAL

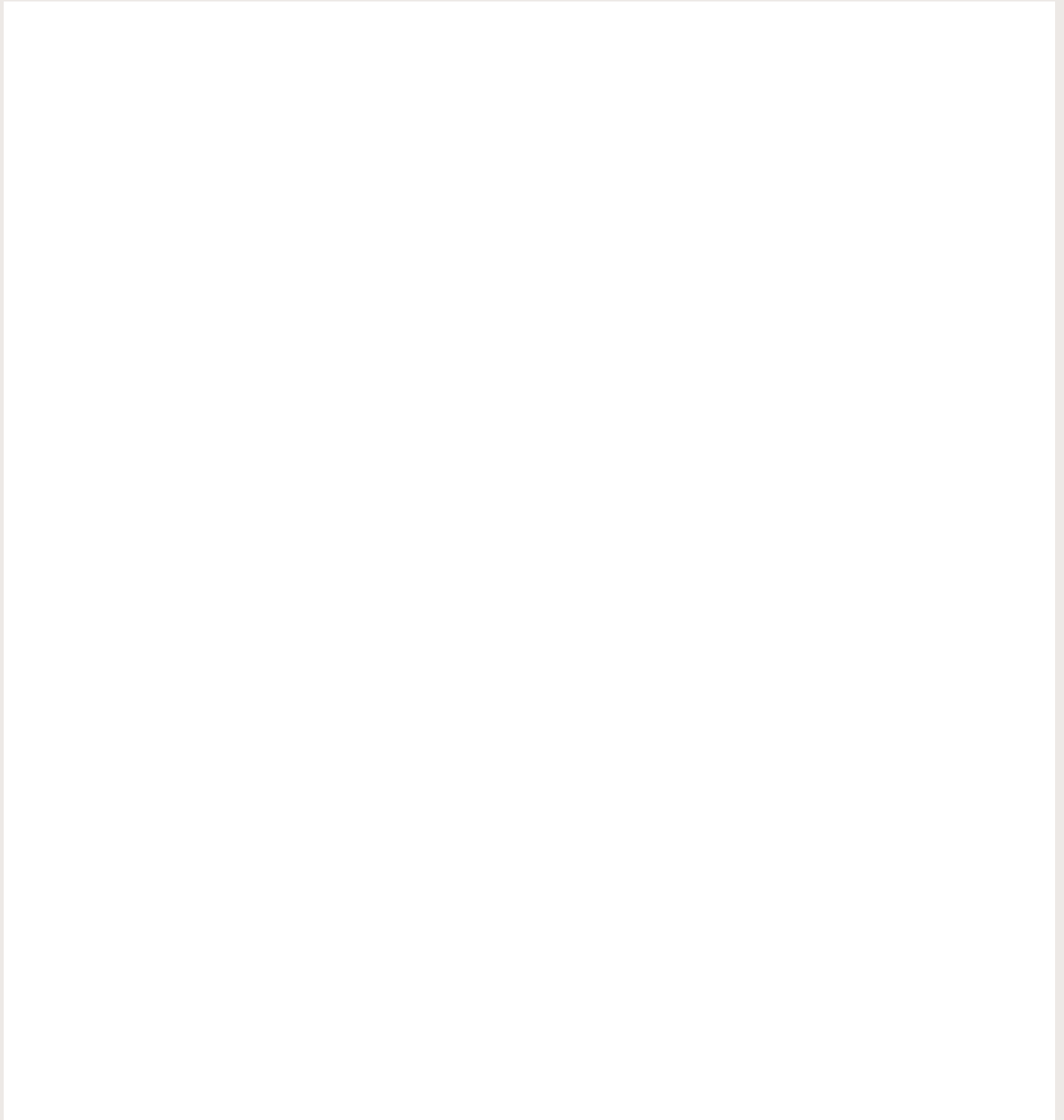
DYING WELL

As you prepare for this journey, consider what matters most to you. Are there specific thoughts or wishes you have for your passing? Think about the people whose presence would bring you comfort during this time. Perhaps you would like to surround yourself with photos that reflect your cherished memories. Incorporate scents and music that evoke peace and nostalgia. And if you have beloved pets, you may wish that they're part of your final moments, offering companionship and solace.



MY BELONGINGS

these are separate to items I have outlined in my will...



FUNERAL/CREMATION PLANNING

Planning your own funeral is a deeply personal experience, allowing you to shape the final celebration of your life according to your wishes. Consider whether you prefer cremation or burial, as this decision can profoundly impact the funeral arrangements. If you have a preference for a specific funeral company, communicate this here to ensure your desires are respected. Crafting a basic obituary can provide guidance for loved ones, sharing essential aspects of your life story and the legacy you wish to leave behind. You may also wish to express any preferences for music or the type of service, whether it's a solemn ceremony or a joyous celebration of life. Additionally, selecting a coffin that resonates with you aesthetically or spiritually can add a personal touch to the proceedings. By considering these aspects, you can ensure that your funeral reflects your values, beliefs, and unique essence, offering comfort and closure to those who gather to honour your memory.

FUNERAL/CREMATION PLANNING

F I N A L C H A P T E R

SOME THINGS
I WANT TO SAY



“

letters to my loved ones

”



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