EDITION: BRITISH, LIVING IN THE UK

Just in Case

Everything your loved ones need to know - in one place

PART 1 - THE FORM

This document belongs to

Date prepared

Original of this document

Where:

In an emergency, start on page 2

This document never asks for passwords, PINs or codes. You only record WHERE they are kept.

This document is not a will or a power of attorney and has no legal force. It helps your loved ones find information. For legal matters, speak to a solicitor.

SECTION 01

Start here

If you are reading this in an emergency - read this page first.

01

> I'm in hospital or can't act for myself: see the guide, checklist 'If I can't act'. I have died: see the guide, checklist 'After a death'.

Call these people first

Name	Relationship	Phone	What they can help with

Urgent - the first 24 hours

Who or what needs looking after immediately (children, elderly relatives, pets)

Who can collect the children from school / nursery

Who can look after the pets

Medication I take daily (important if I'm in hospital)

Spare house keys

Where:

My will

Where:

Folder with my most important documents

Where:

Emergency access to my password manager

Where:

SECTION 02

About this document

Who prepared this document, when, and where the copies are.

Full name

Date prepared

Original of this document

Where:

Who has a copy

Who knows this document exists

Review log

Date	What I changed

SECTION 03

Personal details & ID

Full name

Maiden / previous names

Date of birth

Place of birth

Home address

Citizenship(s)

Relationship status

◯ single ◯ married ◯ civil partnership ◯ living together, not married ◯ divorced ◯ widowed

Spouse / partner's name

UK documents

National Insurance number

Passport

Where:

Passport - expiry date

Driving licence

Where:

GOV.UK One Login / Government Gateway sign-in details

Where:

Certificates

Birth certificate

Where:

Marriage / civil partnership certificate

Where:

Divorce decree / final order

Where:

Key contacts

People & professionals

	Name / firm	Phone	Email
Executor of my will			
Solicitor			
Accountant			
Financial adviser			
Employer / HR			
Landlord			
Neighbour with a key			
Faith leader / community			

Family & friends

Name	Relationship	Phone

Person who will let my friends know

Groups and organisations to tell (work, clubs, faith community, online groups)

SECTION 05

Medical

Blood type

Medical conditions

Allergies (medication, food, other)

Implants, pacemaker, prosthetics

NHS number

GP surgery - name, phone

Specialists / consultants

Private healthcare (e.g. through work)

Medication

Medicine	Dose & when	What for

Medical decisions

Who should be told about my condition

I have a Health & Welfare Lasting Power of Attorney

◯ Yes ◯ No

Advance Decision (ADRT) / DNACPR / ReSPECT form

Where:

My wishes about treatment and care

Organ donation

My decision

◯ I want to donate ◯ I don't want to donate ◯ my family can decide

Decision recorded on the NHS Organ Donor Register

◯ Yes ◯ No

SECTION 06

Children

Child 1

Full name

Date of birth

NHS number

Birth certificate

Where:

Passport(s)

Where:

Red Book (health record)

Where:

Health: allergies, conditions, medication

GP surgery

School / nursery - contact

People authorised to collect

Other parent - contact

Clubs and activities - when and where

Daily routine, food, bedtime

What comforts and calms them; what they're afraid of

Children's benefits & savings

I receive Child Benefit

◯ Yes ◯ No

Junior ISA / Child Trust Fund - provider

Other savings for the children

Separation or divorce - legal plan and contact with the children

> Fill this in if you're separated, going through a divorce, or want a plan in place. It also helps a guardian if I'm not here.

My situation

◯ doesn't apply ◯ separating / divorcing ◯ divorced ◯ separated (not married)

Family law solicitor - contact

Family mediator - contact

Court and case number

Court order or written agreement about the children

Where:

Parenting plan

Where:

Who has parental responsibility

Contact schedule: weekly, holidays, handovers

Child maintenance - who pays, how much, into which account, on what basis

Consent for travel abroad and passports - what's agreed

School / nursery knows who may collect the children

◯ Yes ◯ No

If I'm not here: my wishes about contact with the other parent and their family

Guardianship

Person I want as guardian

Back-up guardian

Document where I named the guardian

Where:

My wishes for their upbringing (school, faith, family contact, language)

SECTION 07

Legal

Will

I have a will

◯ Yes ◯ No

Type

◯ drawn up by a solicitor ◯ DIY / online will

Date of will

Original will

Where:

Executor(s)

Registered with a will register (e.g. Certainty)

◯ Yes ◯ No

Powers of attorney

I have a Property & Financial Affairs LPA

◯ Yes ◯ No

Attorneys

LPA documents

Where:

Relationship agreements

Prenup / cohabitation agreement

Where:

Ongoing legal matters, guarantees I've given

Bank accounts

Bank	Account type	Last 4 digits	Sole / joint with

Bank cards, card readers

Where:

Savings & investments

Provider / platform	Type	Account ref (last digits)	Notes

E.g. savings accounts, ISAs, Lifetime ISA, Premium Bonds, share accounts, employee shares, Polish treasury bonds, gold.

Pensions

UK pensions

Provider / employer	Type (workplace, SIPP, personal)	Policy ref (last digits)	Expression of wish submitted
			☐
			☐
			☐
			☐
			☐

Insurance

	Insurer	Policy ref (last digits)	Beneficiary	In trust	Where policy is
Life insurance				☐	
Death in service (employer)				☐	
Income protection				☐	
Critical illness				☐	
Mortgage protection				☐	
Home & contents				☐	
Funeral plan				☐	
Travel				☐	
Other				☐	

SECTION 12

Debts & liabilities

Type (loan, card, car finance, BNPL)	Lender	Ref (last digits)	Joint / guarantor	Insured
				☐
				☐
				☐
				☐
				☐
				☐
				☐

UK student loan

Student Loans Company customer reference

Repayment plan

◯ Plan 1 ◯ Plan 2 ◯ Plan 4 (Scotland) ◯ Plan 5 ◯ Postgraduate ◯ not sure

How I repay

◯ through my pay (via my employer) ◯ directly to SLC ◯ not repaying yet

SLC online account sign-in details

Where:

Money I owe to individuals

Money owed to me

Regular payments & subscriptions

What	Company	How paid (direct debit, card, standing order)	What to do

As of: _____

SECTION 14

Work, income & tax

Employer

Which account my salary goes into

Other income (rent, benefits, annuity)

UK tax

UTR (if I file Self Assessment)

I file a Self Assessment tax return

◯ Yes ◯ No

SECTION 15

Business

Business type

◯ sole trader ◯ limited company (Ltd) ◯ partnership

Business name

Companies House / VAT number

Co-owners / shareholders

Business bank account

Accountant

Business records and accounts

Where:

Key clients, contracts, staff

Shareholder / partnership agreement

Where:

Who can keep the business running short-term

What should happen to the business

SECTION 16

Home & household

My home is

◯ owned ◯ rented ◯ with family

Tenancy agreement

Where:

Deposit - which protection scheme (TDS, DPS, mydeposits)

Utilities

	Provider	Customer ref	Notes
Electricity			
Gas / heating			
Water			
Broadband / TV			
Service charge / management company			
Council Tax			
Bins / waste			

Practical

Water stopcock

Fuse box

Boiler - service engineer

Alarm code

Where:

Regular help (cleaner, gardener, plumber)

SECTION 17

Property

Property 1

Address

Owners (sole, joint with)

Land Registry title number

Deeds

Where:

Mortgage - lender

If let: tenants, letting agent, agreements

Vehicles

Make & model	Registration	V5C logbook	Finance / lease	Insurer	Spare key

SECTION 19

Digital life

> Don't write passwords or PINs here. Record WHERE they are: a sealed envelope, a safe, a password manager.

Devices

	Model	Where the PIN / password is kept
Phone		
Computer / laptop		
Tablet		
Other		

Account access

Password manager (which one)

Emergency access set up for

Emergency kit / master password

Where:

2FA backup codes

Where:

Authenticator app - on which device

Legacy settings

	Set up	For whom
Apple - Legacy Contact	☐	
Google - Inactive Account Manager	☐	
Facebook - legacy contact	☐	

Accounts & my wishes

Service (email, social media, cloud)	Username / address	Wish

Service (email, social media, cloud)	Username / address	Wish

Where photos and important files are (cloud, drives)

SECTION 20

Crypto

> NEVER write your recovery (seed) phrase here. Whoever has it, has your funds.

Exchange / wallet	Type (exchange, hardware, app)	Where the recovery phrase is	Where the device is

Person who can help recover the funds

Pets

Name & species	Microchip number	Vet	Food, medication	Who will take them

Pet passport / records

Where:

Pet insurance

SECTION 22

Where my documents are

An index of every important document and where it's kept.

Main folder / binder

Where:

Safe - where it is, and where the code / key is

Where:

Safe-deposit box - bank and who has access

Scanned copies

Where:

	Where	Notes
Will		
Birth / marriage certificates		
Passports & ID		
Property deeds		
Insurance policies		
Pension paperwork		
Tax records		
Children's documents		
Vehicle documents		
Medical records		
Powers of attorney		
Letters to loved ones		

My wishes

Funeral

Type

◯ burial ◯ cremation ◯ no preference

Ceremony

◯ religious ◯ non-religious ◯ no ceremony

Place / cemetery / family grave

Music, readings, clothing, who to invite

Instead of flowers - donations to

Keepsakes for loved ones

Item	For whom

Letters / recordings for loved ones

Where:

> These wishes aren't legally binding. Put anything important in your will.

Guide - checklists

What to do, step by step. Not everything applies to every situation.

If I can't act for myself (hospital, illness)

- [ ] 1 Look after children, dependants and pets - see the 'Start here' page.
- [ ] 2 Give the hospital the medication and allergy list from the 'Medical' section.
- [ ] 3 Only attorneys under a registered LPA can manage finances or health decisions. Without one, the family must apply to the Court of Protection, which takes months.
- [ ] 4 Tell my employer. Ask about sick pay and benefits.
- [ ] 5 Keep essential bills paid: rent / mortgage, utilities, insurance.

After a death - in the UK

- [ ] 1 Get the medical certificate of cause of death (MCCD). Sometimes a coroner is involved.
- [ ] 2 Register the death with the registrar within 5 days (8 in Scotland). Ask about Tell Us Once - it notifies most government offices at once.
- [ ] 3 Order several copies of the death certificate - banks and insurers will need them.
- [ ] 4 Find the will and contact the executor.
- [ ] 5 Arrange the funeral. Check for a prepaid funeral plan.
- [ ] 6 Notify banks - e.g. through the Death Notification Service.
- [ ] 7 Apply for probate if needed (confirmation in Scotland).
- [ ] 8 Claim life insurance, death in service and pensions. A spouse or civil partner may get Bereavement Support Payment.
- [ ] 9 Secure the home: tell the insurer, redirect post (Royal Mail), sign up to the Bereavement Register.
- [ ] 10 Don't cancel the phone number yet - it's needed for SMS codes.