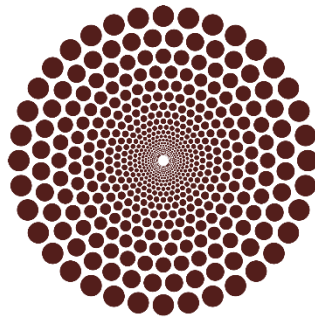


Practical Planning for End of Life



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This form is not a will. It provides information that could be useful for a member of your family, a trusted friend or executor upon your death. It may contain sections that do not apply to you, or you do not wish to complete.

After completing it, store it in a safe and secure place and give the relevant person details of how to access it.

The document will contain confidential information that could help people access your property, so security is paramount.

PERSONAL INFORMATION

My name _____

My address _____

Postcode _____ Tel no _____

Occupation _____

Date of birth _____ Place of birth _____

Name of spouse/late spouse/civil partner/partner (delete whichever does not apply)

WHERE TO FIND MY WILL (If you haven't made a will, contact a solicitor for help).

The location of my will is _____

The date of my latest will is _____

MEDICAL INFORMATION

My NHS number is _____

GP's name _____

Practice address _____

Postcode _____ Tel no _____

THE PERSON I HAVE ASKED TO ACT AS MY EXECUTOR

Contact information for the person you would like to make arrangements (for example: registering the death and contacting the funeral director) if I have no spouse or partner

Name _____

Address _____

Postcode _____ Tel no _____

PEOPLE TO CONTACT FOLLOWING MY DEATH

Relatives and friends

Name _____

Address _____

Postcode _____ Tel no. _____

Name _____

Address _____

Postcode _____ Tel no. _____

Name _____

Address _____

Postcode _____ Tel no. _____

Name _____

Address _____

Postcode _____ Tel no. _____

My Solicitor

Business name _____

Address _____

Postcode _____ Tel no. _____

Contact name _____

Employer (if still working)

Person to contact _____

Name and address of organisation _____

Postcode _____ Tel no. _____

Registrar of Births, Marriage and Deaths – Local Register Office

Address _____

Postcode _____ Tel no. _____

Note: A death may be registered at any local register office, but this may delay matters as the papers need to be sent to the area in which the death occurred. Ask for more than one copy of the Death Certificate. It is cheaper to request copies at the time and having multiple copies speeds up the claiming of assets. Ask about Tell Us Once service to inform DWP and government departments.

Financial contacts (For security reasons, do not write down PIN numbers or account numbers. Please identify internet only accounts.)

Bank

Name & Address _____

Postcode _____ Tel no. _____

Details of accounts:

Account Type _____

Name in which account is held _____

Items in safe custody _____

Account Type _____

Name in which account is held _____

Items in safe custody _____

Building Society

Name & Address _____

Postcode _____ Tel no. _____

Details of accounts:

Account Type _____

Name in which account is held _____

Account Type _____

Name in which account is held _____

Other Financial Institutions where accounts held (e.g. Mortgage, ISA, Pensions, Premium Bonds, Credit Cards, Store Cards, Shares. Add extra pages if needed).

Type of account _____

Name and address of company _____

Postcode _____ Tel no. _____

Type of account _____

Name and address of company _____

Postcode _____ Tel no. _____

Accountant and / or Financial Adviser

Person to contact _____

Name and address of company _____

Postcode _____ Tel no. _____

Tax Adviser

Person to contact _____

Name and address of company _____

Postcode _____ Tel no. _____

Insurance companies/broker (state if policy arranged online)

Type of insurance policy _____

Name/address/website of company _____

Postcode _____ Tel no. _____

Type of insurance policy _____

Name/address/website of company _____

Postcode _____ Tel no. _____

Charities

I make regular donations by standing order (SO) or direct debit (DD) to the following charities

DEALING WITH MY ESTATE

The executor of my estate should carry out the following instructions:

A) If appropriate, notify my solicitor to wind up my estate. Instructions B to F below will not normally apply if a solicitor has been instructed to wind up the estate. Note: The executor may wish to wind up the estate without the assistance of a solicitor.

B) Ask for forms for Grant of Probate/Letters of Administration. These are available from Probate and Inheritance Tax helpline: 0300 123 1072 or from www.gov.uk/wills-probate-inheritance

C) Make the relevant claims resulting from any insurance policies held (Note: details of insurance policies and insurance companies are listed above on this form).

D) Inform the Tax Office

Address _____

Postcode _____ Reference number _____

E) Use 'Tell Us Once' service or inform the Benefits Office (for example, Pension Service).

Address _____

Postcode _____ Reference number _____

F) Check if dependants are entitled to any benefits.

G) If working, ask my employer if pays death-in-service benefit or widows/widowers pension.

H) If necessary, notify the following companies (for example gas, electricity, water, telephone suppliers):

Name & Tel no _____

Name & Tel no _____

Name & Tel no _____

Council tax/rent departments

Address & Tel no _____

I) Other services to contact (for example newsagent, milkman, dentist, optician).

J) Other instructions (Remember this is not a will – do not leave instructions on this form about what you wish to be done with your money and possessions).

WHERE TO FIND THINGS

House keys (including spare sets) _____

Birth certificate _____

Marriage / Civil Partnership certificate _____

Passport / Identity cards _____

Insurance policies (house, holiday, medical etc) _____

Stocks / Shares certificates _____

Deeds of house _____

Lease of property _____

Rent book _____

Bank/Building society / PO savings books _____

Bank / Credit cards _____

Premium Bond certificates _____

Pension documents _____

Income tax papers _____

Car keys _____

Car insurance certificate / MOT _____

Motor breakdown cover _____

Buildings and contents insurance policies _____

Internet provider details (for example, email addresses, company support desk).

Note: The Digital Legacy Association provides information to help you think about what you want to happen to your digital legacy, for example social media accounts, photos stored on electronic devices, when you die.

Mobile phone details (for example, supplier, contract, number)

TV licence details _____

Cable / Satellite TV provider _____

WHERE TO FIND DOCUMENTS ON MY LIABILITIES

Loans _____

Mortgage / Equity release _____

Hire purchase agreements _____

Credit agreements _____

Other liabilities _____

Note: When administering an estate some liabilities may take preference over others. If in doubt, seek legal advice.

FUNERAL ARRANGEMENTS

To my family: It is my wish to spare you the worry and anxiety of organising a funeral in the event of my death. I have outlined my wishes below.

Leaving your body for medical research or for transplants, etc.

Information is available from the Human Tissue Authority

Website: www.hta.gov.uk

I have made arrangements to donate my body to medical science Yes / No

If yes, a copy of my consent form is lodged at (name and address of medical school)

Organ Donation

I have recorded that I wish / do not wish to donate the following organs

I have / do not have a donor card. It can be found in _____

I have a pre-paid funeral plan, on my death please contact:

Company name _____

Address _____

Postcode _____ Tel no. _____

I do not have a pre-paid funeral plan; on my death I would like the following funeral director to be used:

Company name _____

Address _____

Postcode _____ Tel no. _____

I wish to be cremated / buried in a cemetery / buried at a natural burial ground (delete as appropriate)

If cremation

I am happy for the invitation to attend to be extended to everyone I know Yes / No

I wish the ceremony to be private (close relatives and friends only) Yes / No

I wish for an unattended service, sometimes referred to as a Direct Cremation Yes / No

If burial has been pre-arranged

I hold a Faculty reserving grave space in the churchyard of _____

Church in the diocese of _____

I hold a Deed of Grant of Exclusive Rights of Burial issued by:

Council _____ In respect of grave no _____

Section _____ Burial ground/cemetery _____

I wish to be buried in the above grave Yes / No

You can find associated paperwork _____

On my death the above grave grant should pass to

Name _____

Type of funeral ceremony to be performed

I wish the funeral to reflect my faith Yes / No

My religion / philosophy is

I wish the person conducting the service to be a religious leader / celebrant / humanist chosen on my behalf (delete as appropriate)

Or I request the following person conducts my service:

Name _____

Address _____

Postcode _____ Tel no. _____

I want an obituary published Yes / No

If Yes, I want it published in my local paper / on social media (delete as appropriate)

My preferred dress code for mourners would be traditional formal black / bright colours / a splash of one colour / sports shirts (delete as appropriate)

Other (details) _____

My wishes for my care between my death and the funeral

I wish to be embalmed Yes / No

I wish for my family to visit me in the Chapel of Rest Yes / No

I wish to be dressed in a funeral gown / my own clothes (description) _____

My choice of coffin is solid wood / veneered mdf / wicker / cardboard / wrapped in an image (delete as appropriate)

I would like to arrive at the service using the following transport traditional hearse / electric vehicle / no fuss ambulance or estate car / novelty hearse (details) _____

On the day of the service

Transport: I wish for my family to travel to the service in limousines / their own cars (delete as appropriate)

Music: I would like the following pieces of music to be played

Entry music _____

Hymns (if any) _____

Reflection music (while people sit and reflect on your life) _____

Exit Music _____

Flowers: Are flowers to be sent Yes all / Yes family only / No

Instead of flowers, please send any donations to the following charity/charities:

Orders of Service: I wish to have orders of service Yes / No

Pallbearers: I wish my coffin to be brought in on wheels / carried on shoulders (delete as appropriate)

By funeral director pallbearers / family pallbearers

Special readings or poems: The following readings/poems have special meaning to me, and I would like them to be included in the service.

A gift to take away: I would like each person who attends to receive a gift from me as they leave the service, (examples might be a candle, a pack of seeds, a small bottle of alcohol to raise a toast.

Details _____

The Wake: The wake should be held at a venue of your choice / at the following venue

Instructions for my ashes following a cremation

I would like my ashes to be scattered at the following location with family present / without family present

I would like my ashes interred above the ground in a niche / below the ground in an ashes interment plot. I have not purchased a plot

I have purchased a plot at the following location
