CLELAND & Co LIMITED
CHARTERED ACCOUNTANTS

Personal Affairs Checklist

What is the Personal Affairs Checklist?

The Personal Affairs Checklist (PAC) is a document produced to help you keep a concise record of your personal affairs and papers. Investing a little time now to complete the PAC could save your spouse, partner, relatives or friends a great deal of time and expense in the future.

Who is the PAC for?

The PAC is for everybody. It is organised into three sections:

- **Section 1** gives information e.g. key advisers, location of your will etc, which might be needed quickly.
- **Section 2** covers your financial affairs: bank accounts, insurance policies, other assets.
- **Section 3** covers other general information e.g. employment record, membership of clubs.

This form is designed to meet many needs. You need only fill in those parts that are relevant to you.

What do I do with the completed PAC?

The completed form will contain confidential information which should not be left lying around. We recommend that either:

1. You keep the form somewhere safe, maybe in your bank or with your accountant or solicitor.
2. You give the form to someone you trust to hold in a safe place for you.

What is the difference between the PAC and my Will?

The PAC is not a will and should not contain instructions about what should be done with your money or possessions. It is a record of where your key personal records, assets and papers can be located.

Name
Address
Date completed
PAC held at

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Section 1

Advisers

Accountant	Doctor
Name	Name
Address	Address
Telephone	Telephone

Advocate/Solicitor	IFA
Name	Name
Address	Address
Telephone	Telephone

Other Advisers

Name	Name
Address	Address
Telephone	Telephone

Name	Name
Address	Address
Telephone	Telephone

In the event of my death or incapacity due to illness please contact:

Name	Name
Address	Address
Relationship	Relationship
Telephone	Telephone

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My Will

The original Will is held by

The Will is dated

The Will is drawn up by

Address

The Executors are

Funeral arrangements (note any preferences)

"Living Will" declaration to family and doctors may be found:

Power of Attorney for me is held by:

Medical Research Bequests/Donor Card may be found:

My deed/safe box may be found:

The key/password can be found in a sealed envelope, cross-signed by me, held at:

The access codes/passwords to my computer are to be found in a sealed envelope, cross-signed by me, held at:

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Section 2

Account(s) (e.g. banks, building society, etc.)

I have ☐ (number) account/s held at the institution/s indicated below:

Name of institution	Name of institution
Address	Address
Telephone	Telephone
Account no.	Account no.

Name of institution	Name of institution
Address	Address
Telephone	Telephone
Account no.	Account no.

Name of institution	Name of institution
Address	Address
Telephone	Telephone
Account no.	Account no.

Investments (e.g. shares, unit trusts, premium bonds, national savings certificates etc.)

Type	May be found

Credit Cards

Type of card	Credit card no.

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Main Residence

Address

Joint owner (name & address)

Telephone
Location of deeds
Mortgage lender (name & address)

Account number

Other Properties

Address

Joint owner (name & address)

Telephone
Location of deeds
Mortgage lender (name & address)

Account number

Insurance Policies (e.g. life, car, home, health etc.)

Policy type
Policy no.
Name & address of insurance company

Telephone
Policy can be found

Policy type
Policy no.
Name & address of insurance company

Telephone
Policy can be found

Policy type
Policy no.
Name & address of insurance company

Telephone
Policy can be found

Policy type
Policy no.
Name & address of insurance company

Telephone
Policy can be found

Policy type
Policy no.
Name & address of insurance company

Telephone
Policy can be found

Policy type
Policy no.
Name & address of insurance company

Telephone
Policy can be found

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Section 3

My birth/marriage certificates may be found:

Other documents relating to marriage may be found:

Details of employment

Company name
Address

Employment reference Telephone
Please contact
I am/am not a member of a company pension scheme
Social security number

Company name
Address

Employment reference Telephone
Please contact
I am/am not a member of a company pension scheme
Social security number

Directorships

Company name/s

Taxation – the tax office that deals with my affairs is:

Address

Phone My tax reference

Tax advisers (if any)

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Associations, Clubs and Societies (e.g. charitable societies, trade associations, sports clubs, trade unions, professional bodies etc.)

Association	Association
Address	Address
Contact	Contact
Membership no.	Membership no.

Jewellery/Other assets – details may be found:

Other details (not covered by any section above)

Provided by:
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