

Ducks in a Row

Helping you get your affairs in order



Bolton Hospice
caring from the heart



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Helping you get your Ducks in a Row

Bolton Hospice

Queens Park Street,
Off Chorley New Road,
Bolton BL1 4QT

Fundraising department
01204 663 055

Registered Charity
Number 518704

Paperwork and digital records, acquired over a lifetime detailing a full and active life can be stored in all sorts of places, and keeping the information together and accessible can easily fall by the wayside.

At Bolton Hospice we have seen first-hand how difficult it can be for people and their loved ones when important details or documents cannot be located. Our best advice is to be prepared, which is why we have created this handy Ducks in a Row guide to keep all your important details in one safe and accessible place.

Getting your Ducks in a Row will enable you to record and quickly find important information about your life, without having to sort through masses of paperwork. This

booklet offers a place to record where you keep your will, which energy supplier you use, all the papers relating to your insurance and where all of your key documents such as birth and marriage certificates are located.

The Bolton Hospice Ducks in a Row booklet will guide you through the process of recording and ordering your affairs, allowing you to collect information about your life in one place. This is your own personal book, to use as you like and in whichever way will be most helpful to you.

After you have filled it in, it is important that you store it in a safe, secure place so that you can use it to its full potential, updating it as information changes over time.

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Gibson House, 335 St Helens Road
Bolton BL3 3QD

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Open: 9:00am to 5:00pm

www.fredhamer.co.uk

How to use Bolton Hospice Ducks in a Row



It's so important to keep legal or health documents relating to important aspects of your life, and often they're lodged with many people in multiple locations. Although this variety of paperwork may seem daunting to organise, Ducks in a Row helpfully splits these things up into several sections to keep them all in order for the future.

Your details:

This allows you to record details of yourself and those dearest to you, including friends and family, and even your pets.

Your contacts:

Through your life, you will have made many connections outside of your closest circle of friends. This section allows you to record useful details of such people, those you have worked with or currently work with, medical contacts and utilities.

Your documents:

Over the years, you will have amassed important paperwork, including your insurance details and will. Here you can note the whereabouts of these vital documents.

Your possessions and property:

Here you can record details of things you own which are important in value or sentiment.

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This guide is written with many different people in mind – we have tried to make a guide that everyone can use.

The booklet will allow you to keep a record of a busy life from the calm of your home. Don't feel rushed to complete it – fill it in in your own time, keep it safe, and update it as necessary.

In the event that you become unable to manage your affairs independently, it is vital that someone you trust knows where to find your Ducks in a Row guide, so that they can help to look after everything that is important to you.

Most people have a location where they keep information that is useful in case of emergencies; this could be a suitable place to record information about where your Ducks in a Row guide is stored.

Lastly, it is important for your safety and security that you make sure not to record any key security information in this book, such as PIN numbers and bank account numbers. These pieces of information are confidential and it is vital that they do not fall into the wrong hands.

It's time to begin filling in your Ducks in a Row guide.

Your information

This section contains space for you to enter information about your immediate family, closest friends and your pets and animals. It may be useful to confirm with your friends that the details you fill in are correct, so that they can be contacted when you need them.

In our changing world, phone numbers, addresses and email contacts often change. Whilst it can be difficult to keep track of these it is important to keep your Ducks in a Row guide up to date.

YOUR DETAILS

Your Details

Title.....

Forename(s).....

Last name.....

Date of birth.....

Address.....

.....

..... Postcode.....

Country.....

Telephone number.....

Mobile number.....

Email.....

Do you carry an organ donor card?

☐ Yes ☐ No

If so, where is it kept?.....

.....

.....

.....

Your spouse, partner, civil partner or next of kin

Title.....

Forename(s).....

Last name.....

Date of birth.....

Address.....

.....

..... Postcode.....

Country.....

Telephone number.....

Mobile number.....

Email.....

Are you taking any medicines?

☐ Yes ☐ No

If yes, complete the table below

Name	Reason for taking	Where it is kept
.....
.....
.....
.....
.....
.....
.....

Your medical or health conditions that might be important for people to know

Details of any illness or drug therapy that might affect emergency treatment:.....

.....

.....

.....

.....

.....

Do you suffer from allergies or any allergic reaction to medication?

☐ Yes ☐ No

If yes, please list them here:.....

.....

.....

.....

.....

Do you have a pacemaker or similar appliance fitted?

☐ Yes ☐ No

Please list details here:.....

.....

.....

.....

Your children, parents, dependants or other close family

Contact 1, my

Title.....
Forename(s).....
Last name.....
Date of birth.....
Address.....
.....
..... Postcode.....
Country.....
Telephone number.....
Mobile number.....
Email.....

Contact 2, my

Title.....
Forename(s).....
Last name.....
Date of birth.....
Address.....
.....
..... Postcode.....
Country.....
Telephone number.....
Mobile number.....
Email.....

Contact 3, my

Title.....
Forename(s).....
Last name.....
Date of birth.....
Address.....
.....
..... Postcode.....
Country.....
Telephone number.....
Mobile number.....
Email.....

Contact 4, my

Title.....
Forename(s).....
Last name.....
Date of birth.....
Address.....
.....
..... Postcode.....
Country.....
Telephone number.....
Mobile number.....
Email.....

Your close friends

Friend 1

Title.....

Forename(s).....

Last name.....

Date of birth.....

Address.....

.....

..... Postcode.....

Country.....

Telephone number.....

Mobile number.....

Email.....

Friend 2

Title.....

Forename(s).....

Last name.....

Date of birth.....

Address.....

.....

..... Postcode.....

Country.....

Telephone number.....

Mobile number.....

Email.....

Your pets

Pet 1

Name..... Type/breed.....

Date of birth..... Male/female.....

Chip number (if chipped).....

Special needs.....

Name of vet.....

Telephone number.....

Location of vaccinations record.....

Insurance company.....

Policy and telephone number.....

Your wishes in case of emergency.....

.....

Pet 2

Name..... Type/breed.....

Date of birth..... Male/female.....

Chip number if chipped.....

Special needs.....

Name of vet.....

Telephone number.....

Location of vaccinations record.....

Insurance company.....

Policy and telephone number.....

Your wishes in case of emergency.....

.....



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01204 526 218

coop.co.uk/funeralcare



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**co
op**

It's what we do

YOUR CONTACTS

You probably have a great many contacts who form part of your life. These may include people like your doctor, your spiritual leader or a club secretary. It can be extremely helpful to have details of all these people recorded in one place.

As well as individuals, there'll be a range of contacts (e.g. local shops and services) you could record here. Also, if you are employed, or undertake voluntary work, these might be as useful to record as your membership of clubs and organisations that are important to you.

There is also a section for you to list numbers for the local police or emergency numbers for your utilities, we hope having these compiled in one place will be useful to you.

Key health contacts

(e.g. doctor, pharmacist, optician, local hospital, dentist, district nurse, etc.)

Contact 1, my.....

Name.....

Address.....

.....

.....

Tel. No.....

Contact 2, my.....

Name.....

Address.....

.....

.....

Tel. No.....

Work contacts

(e.g. colleague, business partner, employee, main or voluntary work contact)

Contact 1, my

Name.....

Address.....

Tel. No.....

Contact 2, my

Name.....

Address.....

Tel. No.....

Home contacts

(e.g. cleaner, home help, meals on wheels, local authority care manager)

Contact 1, my

Name.....

Address.....

Tel. No.....

Contact 2, my

Name.....

Address.....

Tel. No.....

Local traders

(e.g. milkman, newsagent, gardener, taxis, or shops where accounts held)

Contact 1, my

Name.....

Address.....

Tel. No.....

Contact 2, my

Name.....

Address.....

Tel. No.....

Organisation contacts

(e.g. clubs, retirement association, services club, memberships, unions)

Contact 1, my

Name.....

Address.....

Tel. No.....

Contact 2, my

Name.....

Address.....

Tel. No.....

Others

(e.g. accountant, solicitor, spiritual leader)

Contact 1, my

Name

Address

Tel. No.

Contact 2, my

Name

Address

Tel. No.

Contact 3, my

Name

Address

Tel. No.

Contact 4, my

Name

Address

Tel. No.

Useful telephone numbers

Local police (non-emergency)

Doctor (out of hours)

Water (emergency)

Sewage (emergency)

Gas national (emergency)

0800 111 999

Electricity (emergency)

Bolton Hospice

Local authority

Citizens Advice Bureau

Library



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Telephone: **01204 397053**
Email: **enquiries@cjt.uk.com**

www.cjt.uk.com

YOUR DOCUMENTS

As you go through life, you collect many legal documents, such as birth, marriage or civil partnership certificates, deeds and a will. In this section, you can record the existence and whereabouts of these documents.

Knowing where these can be found is essential for your family or executor in the future if they need to manage your affairs.

Document	Location*
Birth certificate
Marriage/civil p'ship certificate
Deeds to your property
Passport
Driving licence
Television licence
National Insurance card
NHS card
Bus pass or travel card
Other

* (e.g. filing drawer, solicitor, bank)

A funeral plan allows you to make provisions towards your funeral in advance. If you have a funeral plan or life insurance, it is important that its existence is known.

.....

.....

.....

Do you have a funeral plan or life insurance?

Company name
Telephone number
Where documents are kept

Writing a will

allows you to decide what happens to your assets and possessions when you die and is a crucial document for those left behind, which can save distress and unnecessary legal expenses.

Leaving a gift in your will

can be a wonderful way of leaving a legacy that really makes a difference and what's more it could reduce your Inheritance Tax burden. For more information about will writing, go to www.boltonhospice.org.uk or call (01204) 663 055.

A Lasting Power of Attorney (LPA)

allows you to appoint a trusted person(s) to act on your behalf if you are unable to make certain decisions yourself. There are two different types of LPA – Health & Welfare and Property & Financial Affairs.

Living wills, advance decisions, advance statements or advance directives.

All these documents state your wishes should you become unable to make or express your own decisions, giving the people involved in your care the confidence to take decisions based on what you wanted to happen.

If you have any of these documents it is advisable to make sure they are kept up to date and that relevant people know about them, so they can be used if needed.

	Location	Executor(s)*
Will
Power of Attorney
Living Will

*Executor(s)/attorney/nominated person as named in the appropriate document.

A will is an important document that ensures those you care about are provided for after your death.

Writing a will allows you to decide what happens to your assets and possessions when you die. Without a valid will, a person's estate is said to be 'intestate' and can mean that the specific wishes you may have for your family or loved ones may not be carried out. We recommend that you use an experienced solicitor to draft your will or make amendments to an existing will.

What about Inheritance Tax?

If your estate is over a certain value your beneficiaries will need to pay Inheritance Tax; 40% will be taken from the portion of your estate that is over the threshold.

Gifts to charities are exempt from Inheritance Tax and the value of your estate is calculated after the value of gifts like these are deducted. For more information, please visit www.gov.uk/inheritance-tax

Gifts to charities

We know that your first priority when making your will is to provide for your loved ones, but many people find that after they've done this they are able to leave a gift to a charity.

After you've taken care of your loved ones, leaving a gift or legacy in your will to Bolton Hospice is a great way to invest in your community and help guarantee the future of hospice care for local people.

Gifts in wills enable us to support our patients and their loved ones when they need us most, making it a vital income stream for the hospice.

All gifts are very gratefully received. Even a gift of 1% makes a huge difference, and means that you will be leaving 99% of your estate to your family.

All you need to leave a Gift in your Will to us is our address and charity number:

Bolton Hospice
Queens Park Street, Off Chorley New Road
Bolton,
BL1 4QT
Registered Charity number: 518704

We partner with a number of local solicitors and offer a special rate to make a will in the month of November each year.



YOUR POSSESSIONS & PROPERTY

Everybody has possessions and it can be extremely useful to maintain a record of what they are, where they are located and where key documents relating to them are kept. This booklet is the ideal place for noting this down.

This might include information about property, vehicles and significant possessions.

Property that you own

Address (if different to the details given earlier)

.....
.....
.....

Postcode

Country

Telephone number

Are you the freehold owner or leaseholder?

☐ Yes ☐ No

If freehold owner, do you have an equity release or mortgage on the property?

☐ Yes ☐ No

If so, provide details:

If leaseholder, who is your landlord?

.....

Landlord telephone number

Do you have a tenant?

☐ Yes ☐ No

Tenant telephone number

Here you can record details of cars, motorcycles, caravans, mobility scooters, etc.

Vehicle 1

Name of keeper of vehicle.....

Make and model.....

Registration number.....

Location of documents relating to the vehicle.....

.....

Where serviced.....

.....

Warranty details.....

.....

Garaging or parking permit details.....

.....

Vehicle 2

Name of keeper of vehicle.....

Make and model.....

Registration number.....

Location of documents relating to the vehicle.....

.....

Where serviced.....

.....

Warranty details.....

.....

Garaging or parking permit details.....

.....

Significant possessions

It may be worthwhile noting your significant possessions here. This often brings peace of mind, because if someone else must manage your affairs, they may not be fully informed and important items could be lost.

Significant possessions might include antiques, furniture, ceramics, glass, jewellery, rugs, paintings, watches, clocks, books.

.....

.....

.....

.....

.....

.....

Items of sentimental value might include letters/cards, photographs, photograph albums, costume jewellery, items from your childhood or from your children and family memorabilia.

.....

.....

.....

.....

.....

.....

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YOUR FINANCES

This is where you can put all your financial information together in one place. It will allow you to keep track of your different financial arrangements and help your family or trusted person to look after your affairs should the need arise.

Please remember not to record PIN numbers or key security information of any sort.

Here you can list the various financial accounts you have. This might include current accounts, savings accounts, mortgage accounts, ISAs, or National Savings.

Organisation 1 »

Name(s) in which account held

Type

Tel. No.

Cheque book or Passbook ☐ Yes ☐ No

Debit card ☐ Yes ☐ No

Organisation 2 »

Name(s) in which account held

Type

Tel. No.

Cheque book or Passbook ☐ Yes ☐ No

Debit card ☐ Yes ☐ No

Organisation 3 »

Name(s) in which account held

Type

Tel. No.

Cheque book or Passbook ☐ Yes ☐ No

Debit card ☐ Yes ☐ No

You may have pensions (e.g. state or work), shares, PEPs, Premium Bonds or endowment policies. You can record who they are with here.

Organisation 1 »
Type
Tel. No.

Organisation 2 »
Type
Tel. No.

Organisation 3 »
Type
Tel. No.

Credit and store cards (Do not list card numbers)

Issuer	Tel. No.
Card 1
Card 2
Card 3

Notes of other regular payments

(E.g. standing orders, direct debits, membership fees, charity donations)

Organisation	Tel. No.
1
2
3
4

Where do you keep documents relating to all these affairs?

.....

.....

.....

.....

.....

The next section also allows you to note details of the different insurance policies that cover your life arrangements, as well as the essential accounts you hold with different utility companies.

Utility and key suppliers and accounts

	Supplier	Account No.
Water		
Sewerage		
Gas		
Electricity		
Telephone		
Mobile phone		
Internet/broadband		
Cable/satellite TV		
Council Tax		
Landlord/rent		

HM Revenue and Customs office

Location.....

Telephone number.....

State benefit contact

Location.....

Telephone number.....

Benefits claimed.....

.....

Insurance policies

	Organisation	Tel No.
Home Contents		
Document location		
Renewal date		
Building		
Document location		
Renewal date		
Motor		
Document location		
Renewal date		
Motor Breakdown		
Document location		
Renewal date		
Life		
Document location		
Renewal date		
Travel		
Document location		
Renewal date		
Health/long term care		
Document location		
Renewal date		
Other (eg. warranties)		

YOUR FINAL WISHES

This section is the ideal place for you to include your thoughts and wishes for the time when others will have to administer your affairs.

It will undoubtedly be a difficult time for your loved ones but made so much easier if they know what your preferences are.

Your funeral wishes

Most of us try to avoid thinking about our own death and organising your own funeral may not be something you wish to think about. It may be helpful to consider what type of funeral you would like, where you would like it to be held, who you would like to be there, any readings and poems you'd like to be read (and by whom) and any particular music you'd like to be played.

Above all, this section is the perfect opportunity to let loved ones know your wishes.

First choose and note which statement below applies to you:

- ☐ I am describing my funeral wishes in this booklet (overleaf).
- ☐ I have already thought about my funeral arrangements (below).

They are stored (give location).....
.....
.....
.....
.....
.....
.....

e.g. held in my funeral plan or written in my will
(note that wills are not always read before the funeral).

Now go through the steps on the next page, answering or ticking where you can. If you are not sure, don't worry. Just complete what you can. Any guidance you can give will help your loved ones. If you have no preference, simply say so.

Medical science

If you have arranged to donate your body to medical science, please note here who needs to be notified of your death to make the necessary arrangements:

Name.....

Telephone number.....

Do you carry an Organ Donor Card?

☐ Yes ☐ No

Service

Would you like a Funeral Service?

☐ Yes ☐ No

or a brief committal at the graveside or crematorium

☐ Yes ☐ No

If yes, in which religion / spiritual belief / philosophy?

.....
.....

If yes, where would you like it to be held?

.....
.....

Do you have a strong preference which funeral director is used?

☐ Yes ☐ No

If so, please supply name and telephone number

.....

I would want to be

☐ Buried ☐ Cremated

Burial

☐ I have ☐ I have not arranged for a burial plot

If you have, please give details, e.g. existing plot/pre-purchased plot, who owns the plot and where the documents are kept.

.....
.....
.....
.....
.....

If not, where would you like to be buried, e.g. religious location/ cemetery/ woodland or green site/ other? Please give details.

.....
.....
.....
.....
.....
.....

Cremation

- ☐ I do not mind where I am cremated
- ☐ I would prefer to be cremated at

I would like my ashes to be

- ☐ Scattered
- ☐ Buried
- ☐ Interred
- ☐ Kept

Please indicate where, e.g. a special place, crematorium burial plot, religious location, family grave, crematorium garden of remembrance, an urn or I would like to allow my family to decide.

I would like my coffin to be

- ☐ Traditional (wood)
- ☐ Modern (E.g. wicker/ cardboard/ decorated)

I would like my body to rest

e.g. at the funeral home, at home, in the family home or at the church the night before the service.

- ☐ I would prefer my body to be embalmed if possible.
- ☐ I would not prefer my body to be embalmed if possible.

I would prefer my body to be dressed in

- ☐ I do have a preference about what route is taken to the service/ crematorium/cemetery.
- ☐ I do not have a preference about what route is taken to the service/crematorium/cemetery.

My preferred route is

I would like my funeral to be conducted by:

Name.....
Telephone number.....

I would like the following at my funeral

e.g. music, songs sung or played.

.....

.....

.....

Readings e.g. poems, eulogy, religious words.

.....

.....

.....

Prayers

.....

.....

.....

Announcement

I would like the announcement of my death to be made in

- ☐ Local press ☐ National press

I would wish the notice to go into the following publications.

Name of newspaper(s)

.....

.....

.....

.....

Family and friends

I would like the following family members and friends to be asked if they would take part in the funeral, e.g. as a coffin bearer or a reader:

Name

Telephone number

What I'd like them to do

.....

Name

Telephone number

What I'd like them to do

.....

Flowers or donations

- ☐ I would like flowers at my funeral.
- ☐ I would not like flowers at my funeral.

If yes, do you have a preference on what type?

.....

.....

I would prefer donations to go to the following charities:

Name of charities

.....

.....

After the funeral

I would want my friends and family to join together and

.....

.....

Memorial

- ☐ I would like a memorial stone of the following type and with the following words.....

- ☐ I would prefer another type of commemoration
e.g. bench, tree planted, donation to a charity.

Special request

I wish for my pet(s) to be cared for after my death in the following manner.....

Other wishes

e.g. requests, cultural or religious requirements and customs

- ☐ I have ☐ I have not
made some financial provision for these arrangements and wishes.
If you have, give details.....

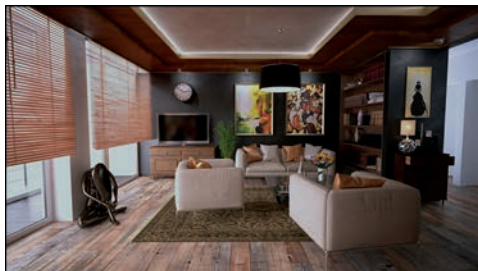
Leaving a message

You might want to consider leaving a message to your loved ones. Many of us leave things unsaid with those we care about the most and so often people say, 'I wish I'd asked him or her...'; 'I wish we'd talked about...' or 'I wish I'd told them...'

There may well be topics you've never discussed or information that you might want to pass on to your loved ones and talking to them face to face could be difficult or might not be the best way for you to handle it. Instead, writing a letter could be the simplest solution. It might well include information about your family or it could just be the perfect occasion to tell them how much they have meant to you.

Another method for anyone accustomed to making recordings or using a mobile phone is to create a digital film containing your message. That would provide those that you've loved with a record that they would treasure forever.

My message is to be found



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