

# LifeBook

**Record the important  
details of your life you  
or your loved ones  
might need**



# What is the LifeBook?

We all juggle a lot of information, and it's easy to feel overwhelmed trying to keep everything organised.

The Age Cymru West Glamorgan LifeBook is designed to make things simpler, helping you keep all your important details in one clear, easy-to-use place.

It allows you to store key information together, so whether you need to find details about a pet, your energy supplier or a savings account, you'll always know exactly where to look. It also helps make sure your loved ones have the information they may need if they ever have to manage things on your behalf.

Keep it somewhere safe, and let someone you trust know where it is. You can then relax, knowing your important information is organised and ready when it's needed.

**Age Cymru West Glamorgan is your local, independent charity working to help everyone age well and enjoy life.**

We offer practical information, advice and support to help you navigate life with confidence. Whether you're planning ahead or dealing with something right now, our team is here to listen and help where we can.

The LifeBook is divided up into the following sections to help you find what you're looking for:



Personal details



Documents



Life contacts



Possessions



Financial



Final wishes

For your security, do **not** write down sensitive details such as passwords or PINs. Make sure this information is kept private and not stored anywhere it could be seen or accessed by others.

# Personal details

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This section provides space to record details about your family, close friends, and pets. It's a good idea to check with your friends to make sure their contact information is current and accurate.

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## You, the LifeBook owner

Title

Forename(s)

Last name

Date of birth

Address

Telephone  
number

Mobile  
number

Email

## You, the LifeBook owner

## Spouse, partner or next of kin

Devices

Title

Social media  
accounts

Forename(s)

Last name

Email  
accounts

Date of birth

Digital  
subscriptions

Address

Location  
of photos,  
videos and  
important  
files

Telephone  
number

Mobile  
number

Email

## Your children, parents or other close family

Title

Forename(s)

Last name

Date of birth

Address

Telephone  
number

Mobile  
number

Email

Relationship  
to you

## Your pets

Name

Type/breed

Date of birth

Male/female

Microchip number

Special needs

Name of vet

Telephone number

Location of  
vaccinations record

Insurance company

Policy number

Your wishes in case  
of emergency

# Your close friends

Title

Forename(s)

Last name

Date of birth

Address

Telephone  
number

Mobile  
number

Email

Relationship  
to you

**Note below where you keep  
your address book or other  
contact list:**

## Your medical or health conditions

Your NHS number:

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

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

Are you taking any medicines?  
If yes, what for?

Where do you keep your medication?

Do you have a pacemaker or similar appliance fitted?

Have you registered a decision about organ donation?

# Life contacts

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This section gives you space to record details for other important contacts, such as your doctor, faith leader, or local services. You may also wish to include contact information for key people in organisations you belong to, such as clubs, groups, or unions.

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**Key health contacts** (e.g. doctor, pharmacist, optician, local hospital, dentist, district nurse)

Contact type

Name and  
address

Telephone  
number or email

Contact type

Name and  
address

Telephone  
number or email

Contact type

Name and  
address

Telephone  
number or email

**Work contacts** (e.g. employment colleague, business partner, employee,  
main work contact, voluntary work contact)

Contact type

Name and  
address

Telephone  
number or email

Contact type

Name and  
address

Telephone  
number or email

Contact type

Name and  
address

Telephone  
number or email

If you'd like to talk through any of this or  
need further support, **Age Cymru West  
Glamorgan is here to help.**

Call us on **01792 648866.**

**Home contacts** (e.g. cleaner, home help, Meals on Wheels,  
local authority care manager)

Contact type

Name and  
address

Telephone  
number or email

Contact type

Name and  
address

Telephone  
number or email

Contact type

Name and  
address

Telephone  
number or email

**Local traders** (e.g. milk delivery service, newsagent,  
gardener, taxis or local contacts or shops where accounts are held)

Contact type

Name and  
address

Telephone  
number or email

Contact type

Name and  
address

Telephone  
number or email

Contact type

Name and  
address

Telephone  
number or email

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

Contact type

Name and  
address

Telephone  
number or email

Contact type

Name and  
address

Telephone  
number or email

Contact type

Name and  
address

Telephone  
number or email

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

## Useful telephone numbers

Contact type

Local Police  
(non emergency)

Name and  
address

Doctor  
(out of hours)

Telephone  
number or email

Water  
(emergency)

Contact type

Sewage  
(emergency)

Name and  
address

Gas national  
(emergency)

**0800 111 999**

Telephone  
number or email

Electricity  
(emergency)

Contact type

Age Cymru West  
Glamorgan

**01792 648866**

Name and  
address

Local council

Telephone  
number or email

Library

# Financial

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**This is a place to keep all your financial information together, making it easier to manage and track your different financial arrangements. It can also help your family or someone you trust to handle your affairs if needed.**

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**For your security, do not write down your bank account numbers, sort codes or card information, or include sensitive details such as passwords or PINs,**

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

Organisation

Name(s) in  
account held

Type of account  
e.g. current

Cheque book or  
passbook (yes/no)

Debit card  
(yes/no)

Organisation

Name(s) in  
account held

Type of account  
e.g. current

Cheque book or  
passbook (yes/no)

Debit card  
(yes/no)

Organisation

Name(s) in  
account held

Type of account  
e.g. current

Cheque book or  
passbook (yes/no)

Debit card  
(yes/no)

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

Organisation

Type  
e.g. shares

Telephone  
number

You might be receiving certain benefits, such as Pension Credit or Carer's Allowance. If you are, you can record them here.

## Credit and store cards (Please **do not** record the card number)

Type	Issuer	Type	Issuer
Card 1		Card 4	
Card 2		Card 5	
Card 3		Card 6	

## Other regular payments (e.g. standing orders, Direct Debits, membership fees, charity donations)

Organisation	Payment type	Organisation	Payment type
1		4	
2		5	
3		6	

Where do you keep documents relating to all these affairs?

## Key suppliers and accounts

Here you can note the accounts you hold with different utility companies. On the following page, there's room to record the different insurance policies you have.

Supplier

Contact details

Water

Sewerage

Gas/oil

Electricity

Landline

Mobile  
phone

Internet/  
broadband

Cable/  
satellite TV

Council Tax

Landlord/  
rent

For friendly, local support and information, you can contact  
**Age Cymru West Glamorgan on 01792 648866.**

# Insurance policies

Home contents

Building

Motor

Motor breakdown cover

Organisation

Location of documents

Contact details

Renewal date

Life

Travel

Health/care

Other (e.g. warranties)

Organisation

Location of documents

Contact details

Renewal date

# Documents

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This section allows you to note what legal documents you have and where they are kept, such as birth, marriage or civil partnership certificates and your will. Having this information to hand can be very helpful for your family if they ever need to deal with your affairs.

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## Document location

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

Birth certificate

Marriage/civil  
partnership certificate

Deeds to your  
property

Mortgage/lease

Passport

Driving licence

Television licence

National Insurance  
card

NHS card

Bus pass or  
travel card

**Your will** sets out your wishes and is the most reliable way to make sure your belongings and assets are passed on to the people and causes that matter to you.

**A Lasting Power of Attorney** lets you appoint someone to act on your behalf if there comes a time when you're no longer able to make certain decisions for yourself. There are two different types; health and welfare, and property and financial affairs.

**Documents such as living wills, advance decisions, advance statements or advance directives** record your wishes in case you're unable to make or communicate decisions in the future.

**If you have created any of these documents**, it's important that the right people are aware of them so they can be used when necessary. This LifeBook helps you clearly record whether you have made these arrangements and where the documents are kept.

**Age Cymru West Glamorgan can offer information and advice on Lasting Powers of Attorney, wills and planning for the future.**

We also provide a **Lasting Power of Attorney writing service** for those who would like practical help putting arrangements in place.

To find out more, call us on **01792 648866**.

## Executors

(e.g. attorney, nominated person)

## Document location

Will

Power of  
attorney

Advance  
decision

# Possessions

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**This section lets you note details of your important belongings, including property, vehicles, valuable items and things of sentimental importance.**

## Property that you own

Address (if different to the one the given on page 4)

Are you the freehold owner or leaseholder?

If you're the freehold owner, do you have an equity release or mortgage on the property? If so, give details:

If you're the leaseholder, who is your landlord?

Landlord contact details

Do you have a tenant?

Tenant contact details

## Vehicles that you own (e.g. cars, motorcycles, caravans, mobility scooters)

### Vehicle 1

Name of keeper  
of vehicle

Make and model

Registration  
number

Warranty details

Garaging or parking  
permit details

### Vehicle 2

### Vehicle 3

Name of keeper  
of vehicle

Make and model

Registration  
number

Warranty details

Garaging or parking  
permit details

### Vehicle 4

## Significant possessions

You can use this space to record any significant or valuable possessions, along with your wishes for what should happen to them. This can serve as a useful reminder for you and offer reassurance to your loved ones if they ever need to manage your affairs in the future.

Important items might include antiques, furniture, ceramics, glassware, jewellery, rugs, paintings, watches, clocks and books.

## Sentimental possessions

Items of sentimental importance may include letters and cards, photographs and photo albums, costume jewellery, keepsakes from your childhood or your children, and other family mementoes.

# Final wishes

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**This section gives you space to note your thoughts and wishes for the end of your life. Although it will always be a challenging time for those close to you, clearly outlining your preferences in advance can provide comfort and reassurance for everyone**

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## Funeral wishes

Thinking about your own funeral isn't always easy, but it can help to start by considering who you would like to attend, what you would like to be said, and which readings or music you might want included.

You may wish to note which loved ones you would like to give readings or list any names you'd like mentioned in a eulogy.

Writing down your thoughts on these and other details can help prevent misunderstandings or upset at a time when you are no longer able to clarify your wishes.

While it may not be possible for your loved ones to follow every request exactly, completing this section can help them honour as many of your preferences as possible. First, choose and record which of the statements below applies to you:

**I am describing my funeral wishes in this LifeBook (overleaf).**

**I have already thought about my funeral arrangements and I have noted the details of my funeral plan or life insurance below.**

Now go through these steps, answering or ticking where you can. If you're 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.

If you've 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

Contact details

Have you registered your decision to be an organ donor?      Yes      No

Would you like a funeral service?      Yes      No

Or would you like 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 for which funeral director is engaged?

I would like to be      Buried      Cremated

Have you arranged a burial plot?      Yes      No

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? Please give details.

Do you mind where you are cremated?    Yes            No

Please give details.

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, garden of remembrance.

I would like my coffin to be:

Traditional (wood)            Modern (wicker)

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. Please give details.

Would you like your body to be embalmed?            Yes            No

I would like my body to be dressed in:

Do you have a preference about what route is taken to the service/crematorium/cemetery?            Yes            No

My preferred route is:

I would like my funeral to be conducted by:

Name

Contact details

## I would like the following at my funeral

Music e.g. songs sung or played.

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

Prayers.

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

Local press          National press

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

Publication 1

Publication 2

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

### Flowers or donations

I would          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:

For more information about giving in memory to Age Cymru West Glamorgan, please call **01792 648866**.

### **After the funeral**

I would like my family and friends to join together and:

### **Special request**

I would like my pet(s) to be cared for after my death in the following manner:

### **Memorial**

I would like a memorial stone of the following type and with the following words:

### **Other wishes**

Requests, cultural or religious requirements and customs not already covered.

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

I have  have not  made some financial provision for these arrangements and wishes. If yes, give details:

Whatever's on your mind — now or in the future — **Age Cymru West Glamorgan is here to listen and support you.**

You can reach us on **01792 648866.**

## Leaving a message

You may wish to leave a message for your loved ones. There could be things you've never had the chance to discuss or messages you'd like them to know after you've passed. If speaking to them directly isn't what you want, writing a letter is an option. This could include information about your family or simply express how much they have meant to you.

Alternatively, you might consider leaving a video message, giving your family or those closest to you a keepsake they can treasure for years to come.

My message can be found:



Age Cymru West Glamorgan is a local charity that delivers trusted, quality assured and person-centred support that promotes well-being and empowers people to age well.

Our vision is that everyone in Swansea, Neath Port Talbot, and Bridgend is able to age well and enjoy life.

Where you can find us

 **Write to us at:**

Age Cymru West Glamorgan  
250 Carmarthen Road  
Swansea, SA1 1HG

 **Call:** 01792 648866

 **Email:** [enquiries@agecymruwestglamorgan.org.uk](mailto:enquiries@agecymruwestglamorgan.org.uk)

# Leaving a gift

**You can help ensure that, in the years ahead, older people across Swansea, Neath Port Talbot and Bridgend continue to receive the support they need.**

When people kindly include gifts in their wills to Age Cymru West Glamorgan, it makes a real difference to older individuals on our doorstep who have few other sources of help. From providing a person with a home-visit and information and advice to help them access crucial benefits, to offering dementia support to clients and their carers, and much more, these thoughtful gifts can be a vital lifeline for those facing numerous challenges.

With more older people experiencing a later life they might not have anticipated, the demand for our services is only growing. Your generous gift could help us continue to be there, offering comfort, respect, and practical support to older people for years to come.

Call us on **01792 648866** to speak to a friendly member of our team about leaving a legacy, with the impact felt for years to come.



If you know anyone else who would benefit from the Age Cymru West Glamorgan **LifeBook** please ask them to call us on **01792 648866** for their free copy.