

LifeBook

**A safe and easy way
to record the practical
details of your life**



What is the LifeBook?

We all have lots of things to remember – and it can sometimes feel overwhelming trying to stay on top of it all. The Age UK LifeBook is here to help you keep track of everything.

It's a way to keep all your important information in one place. So when you need to dig out some details about a pet, an energy supplier or a savings account, you know exactly where to look. It also ensures that your loved ones have the details they need if they ever have to sort something out on your behalf.

Keep it somewhere safe. Let someone you trust know where it is. And enjoy peace of mind knowing your important information is in order for when it's needed.

Age UK has a range of free information guides and factsheets on a variety of subjects – from money and benefits to health and housing. To request a copy of any of our free resources, call the Age UK Advice Line on **0800 169 65 65**.

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

It's important **not** to include key security information such as passwords or PINs. You should make sure this information stays confidential and isn't recorded where others could find it.

Personal details

In this section, we've included space for the details of your family, closest friends and pets. It's worth checking with your friends that their personal details are up to date.

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

Forename(s)

Social media
accounts

Last name

Date of birth

Email
accounts

Address

Digital
subscriptions

Telephone
number

Location
of photos,
videos and
important
files

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

**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

In this section, we've included space for the details of your other important contacts, such as your doctor, faith leader or local services. You might also want to note down the details of key contacts at organisations you're a part of, like a club or a union.

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

Age UK's free guide **Useful contacts** has information on organisations that provide support and advice on topics such as consumer matters, social care, health, housing, money and legal issues.

Call Age UK Advice Line on **0800 169 65 65**.

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)

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

Useful telephone numbers

Local Police
(non emergency)

Doctor
(out of hours)

Water
(emergency)

Sewage
(emergency)

Gas national
(emergency)

0800 111 999

Electricity
(emergency)

Local Age UK

Age UK
(information line)

0800 169 65 65

Local council

Citizens Advice
Bureau

Library

Financial

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

Please remember not to record key security information like passwords or PINs.

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

See Age UK's free guide **Save energy, pay less** for information on how to make your home warmer without spending more on heating bills.

Call Age UK Advice Line on **0800 169 65 65**.

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

In this section, you can record the existence and whereabouts of the legal documents you have, such as birth, marriage or civil partnership certificates and your will. Knowing where these can be found can be really helpful for your family if they ever need to manage your affairs.

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 reflects your wishes and is the best way to ensure that your assets go to the people and causes you care about.

A power of attorney allows someone to act on your behalf if a time comes when you are unable to make certain decisions yourself. There are different types of power of attorney depending on where you live in the UK.

Living wills, advance decisions, advance statements or advance directives state your wishes should you become unable to make or express your own decisions, allowing the people providing your care to take decisions based on those wishes. The relevant document for you depends on where you live in the UK.

If you have any of these documents it's important to make sure the relevant people know about them, so they can be used when needed. This **LifeBook** allows you to clearly indicate whether you have made these arrangements and where any documents can be found.

Our range of free guides, such as **Power of attorney, Wills and estate planning** and **How to be an executor**, provides practical information and advice.

Call Age UK Advice Line on **0800 169 65 65**.

Executors

(e.g. attorney, nominated person)

Document location

Will

Power of
attorney

Advance
decision

Possessions

In this section, you can record the details of your important possessions – from property and vehicles to valuables and sentimental items.

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 note down significant or valuable possessions here, and what you'd like to happen to them. As well as being a helpful reference point for you, it could be reassuring for you and your loved ones if they need to manage your affairs in the future.

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

Sentimental possessions

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

Final wishes

In this section, you can record thoughts and wishes for the end of your life. While it'll always be a difficult time for your loved ones, making your preferences clear ahead of time can bring peace of mind for everyone.

Funeral wishes

Your own funeral isn't necessarily easy to think about – but you can start by asking yourself who you'd like to be there, what words you'd like said and what readings and what kind of music you'd want.

You might want to say which loved ones you'd like to give readings, or else specify names you'd like mentioned in a eulogy.

Noting down your thoughts on these and other details can help avoid misunderstandings or unhappiness when you are no longer there to resolve the issues that can arise.

Of course, it may not be possible for your loved ones to completely fulfil all of your wishes, but by completing this section you can help them to carry out as much as possible. First choose and note which statement 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.

Would you like your body to be embalmed? Yes No

I would like my body to be dressed in:

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.

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 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.

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 UK, please call **0800 077 87 51**.

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:

Age UK's information guide **Thinking about end of life** takes you through the things you may want to think about when you're considering your options for the future.

Call Age UK Advice Line on **0800 169 65 65**.

Leaving a message

You might want to consider leaving a message to your loved ones.

There might be topics you've never discussed or things you'd like them to know after your death. If you don't want to talk to them face to face, you could consider writing a letter. It could include information about your family – or just tell them how much they've meant to you.

You could also consider leaving a video message that would provide your family or those that you've loved the most with a record that they would treasure forever.

My message is to be found:

About Age UK

Knowing where to turn for information and advice you can trust can be difficult. But Age UK is there for you, if and when you need us.

We provide information and advice on a range of topics from money and legal to health, care and housing through our Age UK Advice Line, printed publications and on our website. You can:

- Call the **Age UK Advice Line** on **0800 169 65 65** and speak to one of our friendly advisers (open 8am-7pm, 7 days a week, 365 days a year).
- Go online at **www.ageuk.org.uk** for information and advice and to find out more about what we do.
- Read one of our **free information guides and factsheets**. These can be ordered through the Age UK Advice Line or downloaded from our website.
- Contact your **local Age UK**. We have a network of over 120 local Age UKs supporting communities across the country.

But it isn't always about the practical things. For some it might just be about having a chat and hearing a friendly voice. If you're feeling lonely, we're there for you too.

- You can sign up to the **Age UK Telephone Friendship Service** by calling **0800 434 6105**.
- You can call **The Silver Line**, a 24-hour helpline that offers support and friendship, on **0800 4 70 80 90**.

Leaving a gift

You could help ensure that years from now, older people can get the support they need.

When people generously leave gifts in their wills to Age UK, it makes an enormous difference to older people who have nowhere else to turn. From providing a lonely older person with a friendly telephone call each week, to helping people access the advice and support they need on issues like staying in their beloved home, these special gifts provide a lifeline for someone who is struggling.

With more and more older people facing a later life they never expected, we anticipate an ever-increasing need for our services. Your compassionate gift could allow us to continue to be there – and to give older people the comfort, respect and support they need in the years to come.

If you'd like to find out more about making this special gift, contact our Legacy team by:

- calling **020 3033 1421**
- emailing **legacies@ageuk.org.uk**
- or writing to **Age UK, Legacy Team, 7th Floor, One America Square, 17 Crosswall, London, EC3N 2LB.**

Thank you.

If you know anyone else who would benefit from the Age UK **LifeBook** please ask them to call us on **0800 169 65 65** for their free copy.