



Checklist - Planning Ahead

Make sure key **legal documentation** is up to date and in order:

- Last Will and Testament (appoint executors, ideally with their knowledge & consent)
- Lasting Power of Attorney (LPA) for Health & Welfare and for Property & Financial Affairs
- Advance Decision to Refuse Treatment (ADRT or Living Will)

Other **important documentation**:

- Letter of Wishes/ Letter of Funeral Wishes
- Organ Donor Registration or opt in/ out choice
- Legacy Will/ Ethical Will

Gather together **household** and **administrative information**, including **passwords** where required:

- National Insurance/ Pension record
- National Health number
- Unique Taxpayer Reference
- Passport number
- Property deeds
- Employer information
- Lawyer
- Accountant
- Financial adviser
- Bank accounts
- Credit card providers
- Details of outstanding loans
- Insurers (household, mortgage, life, health, car, pet, etc)
- Mortgage provider
- Driving License number
- Car details/ loans
- Payment systems (eg PayPal)
- Bitcoin
- Home security system/ household safe
- Utility providers (electricity, gas, water)
- Landlord
- Mobile phone
- Landline telephone
- Internet
- Newspapers & magazines



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(List cont.)

- Social media (Twitter, Facebook, Instagram, etc)
- TV and media subscriptions (Netflix, Amazon Prime, etc)
- Books and audiobook subscriptions
- Online gaming subscriptions
- Online photo/ data storage (Icloud, etc)
- Online music/ playlists (Spotify, etc)
- Antivirus
- Gym or health club membership
- Sports, social and other club memberships
- Loyalty cards

Business Owners consider the impact your death will have on your business

Digital memorials and **digital legacy:**

- Make sure photos are stored somewhere that those you wish to do so have access
- Decide what happens to your online social media presence (appoint a Legacy Contact)
- Decide how you wish to be remembered and curate your digital legacy, if desired

Share information with those closest to you and ensure they agree with your plans. This can help avoid disputes and disagreements after you have gone

Important discussions to have with those closest to you:

- End of life decisions around treatment and care
- Whether you wish to be buried or cremated (or other) and where
- If you are cremated what should happen to your ashes?
- Funeral wishes (memorial, celebration of life, religious/ non-religious, no ceremony)
- Wishes around key possessions, both big and small
- Preferences for charitable donations

Make sure all this information is **written down** and **kept somewhere secure**, in print form and/ or in a digital locker

Ensure the relevant people know **where to find** everything and how **to access it**

Decide who will care for your **pets** and any **other animals**

To help you plan a funeral, please go to [whiteballoon's free Planning Tools](#)

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