



The Little
Book of Me

In a digital world full of account numbers and user names, it may be hard to imagine someone trying to locate all of that information when the time comes. We have created this **'Little Book of Me'** document as a way for you to capture all of your important personal and financial details in one place. We will then store this alongside your Will or LPA for safe keeping.



Your Personal Details

Full Name Including Middle Names	
Date of Birth	
National Insurance Number	
Address	
Telephone Number	
Mobile Number	

Your Next of Kin

Full Name	
Address	
Telephone Number	
Mobile Number	
Relationship to you	

Your Pets

Name	
Type	
Chip Number	
Vet Details	
Address	
Contact Number	
Insurance Details	
Company	
Policy Number	
Contact number	
Your wishes of who to look after your pet in case of an emergency	

Health Information

Doctor Details:

GP Name:

Surgery Address:

Contact Number:

Any allergies?

Current Health Conditions:

Dentist Details:

Practice Name:

Address:

Contact Number:

Your Services

Please include details of services you have such as Window Cleaner, Milkman, Newsagent, Gardener, Chiropracist, Hairdresser

Service Type:	
Name:	
Contact Number:	
Account Number:	

Service Type:	
Name:	
Contact Number:	
Account Number:	

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Name:	
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Contact Number:	
Account Number:	

Service Type:	
Name:	
Contact Number:	
Account Number:	

Service Type:	
Name:	
Contact Number:	
Account Number:	

Your Finances

Please include bank accounts, Investments, savings accounts.

DO NOT INCLUDE CARD NUMBERS

Accounts			
Account Name:		Account Name:	
Account Type:		Account Type:	
Sort Code:		Sort Code:	
Account Number:		Account Number:	
Branch:		Branch:	
Account Name:		Account Name:	
Account Type:		Account Type:	
Sort Code:		Sort Code:	
Account Number:		Account Number:	
Branch:		Branch:	
Account Name:		Account Name:	
Account Type:		Account Type:	
Sort Code:		Sort Code:	
Account Number:		Account Number:	
Branch:		Branch:	

Accounts

Account Name:	
Account Type:	
Sort Code:	
Account Number:	
Branch:	

Account Name:	
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Sort Code:	
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Branch:	

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Sort Code:	
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Account Name:	
Account Type:	
Sort Code:	
Account Number:	
Branch:	

Utility and key suppliers and accounts

	Supplier	Telephone number
Water		
Gas		
Council Tax		
Electricity		
Telephone		
Mobile Phone		
Internet/Broadband		
Cable/Satellite TV		
Landlord/rent		

Insurance Policies

	Home Contents	Building	Motor	Motor Breakdown Cover
Organisation				
Location of documents				
Telephone number				
Renewal date				

Insurance Policies

	Life	Travel	Health/long-term care	Other (e.g. warranties)
Organisation				
Location of documents				
Telephone number				
Renewal date				

Social Media and Online Accounts

Please include any active social media accounts and online accounts for items such as image storage, TV streaming, online shopping etc.

DO NOT INCLUDE PASSWORDS

Account Type (e.g. Facebook):	
Profile/User Name:	
Associated Email Address:	

Account Type (e.g. Facebook):	
Profile/User Name:	
Associated Email Address:	

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Profile/User Name:	
Associated Email Address:	

Documents

Please record the location of important documents, to assist your Executor(s).

Document	Location
Birth certificate	
Marriage/Civil Partnership certificate	
Deeds to your property	
Passport	
Driving license	
Television License	
National Insurance Card	
NHS Card	
Buss pass or travel card	
Other	

Possessions

	Property that you own
Address (if different to your home address)	
Telephone number	
Are you the freehold or leasehold owner?	
If freehold, do you have an equity release or mortgage on the property? If so, provider details:	
If leaseholder, who is your landlord? Provide details:	
Do you have a tenant?	
Tenant telephone number	

Possessions

	Vehicle 1	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 is worthwhile noting any significant possessions that are not stated within your Will here. This might include antiques, furniture, ceramics, glass, jewellery, rugs, paintings, watches, clocks, books etc

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

Final Wishes

What will undoubtedly be a difficult time for your loved ones can be made easier if they know what arrangements you would have liked.

Funeral Plan

If your funeral wishes are not already stated within your Will, it is important that your Executors know if you have a plan in place.

Do you have a funeral plan or life insurance?	
Company name	
Telephone number	
Policy number	
Where documents are kept	

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 <input type="checkbox"/> No <input type="checkbox"/>
Would you like a funeral service?	Yes <input type="checkbox"/> No <input type="checkbox"/>
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 engaged?	

I would want to be Buried Cremated

Burial

Have you arranged for a burial plot?

Yes

No

If you have, please give details, e.g. plot number, where the plot is, and where the documents are.

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

Cremation

I have no preference where I am cremated

Yes

No

I would like to be cremated at

Would you prefer your body to be embalmed if possible?

Yes

No

I would prefer 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, an urn, or I would like to allow my family to decide.

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

(e.g. wicker / cardboard / decorated)

I would like my body to rest

At the funeral home

In the family home

At the church the night before the service

Name

Telephone number

I would like my funeral to be conducted by:

I would like the following at my funeral:

Music e.g. songs / hymns 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 wish the notice to go in the following publications:

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

Name

Name

Telephone number

Telephone number

What I'd like them to do

What I'd like them to do

Name

Name

Telephone number

Telephone number

What I'd like them to do

What I'd like them to do

Flowers or donations

Would you like flowers at my funeral.

Yes

No

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

I would prefer donations to go to the following Charities:

After the funeral

I would like my family and friends 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

Have you made some financial provision for these arrangements and wishes.

Yes

No

If yes, please give details

Leaving a message

You may wish to consider leaving a message to your loved ones.

There may be information you wish to pass on and discussing this face to face may be difficult. Instead, writing a letter could be the simplest solution.

My message is to be found	
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This booklet will be stored alongside your Will, and handed to your Executors to fulfil your wishes.

We recommend you review the details in this document at the same time you review your Will as details will change.

If you do not wish for Banner Jones Solicitors to store this document for you, then it is really important that you keep it in a secure place at all times as it will contain sensitive and confidential information. A secure place may be a safe, or a locked filing cabinet. Please do not leave it in an unsecure location. Banner Jones Solicitors cannot be held responsible for the security of this document if you choose to store this yourself.

Please do not write security information about your accounts such as card numbers, passwords or PIN numbers in this document.

Talk to Banner Jones - We are ready to help you

www.bannerjones.co.uk

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