

# LifeBook

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



# What is the Age UK LifeBook?

At Age UK, we want you to have one less thing to worry about. With so many things to remember, it can often seem overwhelming trying to keep on top of it all. But with the Age UK LifeBook, you know where everything is when you need it.

The LifeBook lets you keep all the important information you might need in one place. It's one of those things your future self will thank you for. Whether you need to dig out some information about a pet or an energy supplier, you'll know exactly where to find it.

But it's not something that's just going to help you. Letting people you trust know about the LifeBook can make their life that bit easier down the line too. In case you need someone to sort things for you on your behalf, having everything they could possibly need in the same place will help keep things simple.

Fill it out. Let someone you trust know. Keep it safe. Enjoy peace of mind.

# How to use the Age UK Lifebook

Many people have documents in different places and with different people. Banks, solicitors and Independent Financial Advisers are all quite likely to hold some of your paperwork. The LifeBook divides up into the following sections:



## Personal details

Here you can include information about your immediate family, closest friends and pets.



## Life contacts

Details of those friends outside your immediate circle, such as work colleagues, your doctor as well as your gas, water and electricity suppliers.



## Financial

This section will contain details of where you bank, credit cards, insurance policies etc.



## Documents

In this section you can record the existence and location of important documents such as a will.



## Possessions

This will cover items ranging from your home to your car, as well as significant possessions or valuables, such as jewellery.



## Final wishes

This section deals with details family will need to know and your wishes about funeral arrangements. It is also where you can record your thoughts about loved ones.

# Personal details

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**Within this section, we have included space for the details of some of your closest friends and your pets. It's worth checking with your chosen friends that their personal details are correct.**

**People frequently change mobile numbers or email addresses and it can be very useful to have an up-to-date record of these.**

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## Filling out your LifeBook

The LifeBook has been designed to cover everything – but that doesn't mean you need to sit down and fill it all out in one go.

There might be things you can fill out quickly, but there might be other sections that require a bit more time. Of course, what you fill out and when is totally up to you.

Some sections of the LifeBook might be harder to fill out than others, such as the section about your final wishes. It can seem daunting thinking about this sort of thing and jotting it down, but making your wishes known now can make sure they're respected if there should come a time you can't communicate them.

It's important when filling out your LifeBook not to include any sensitive information such as bank account numbers, PINs or key security information. You should make sure this information stays confidential and isn't recorded where others could find it.

We really hope you find your LifeBook helpful.

## You, the LifeBook owner

## Spouse, civil partner, or next of kin

Title

Forename(s)

Last name

Birthday

Address

Postcode

Country

Telephone  
number

Mobile  
number

Email

## Your children, parents, dependants or other close family

Title

Forename(s)

Last name

Birthday

Address

Postcode

Country

Telephone  
number

Mobile  
number

Email

## Your pets

Name

Type/breed

Birth date

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

## Your close friends

Title

Forename(s)

Last name

Birthday

Address

Postcode

Country

Telephone  
number

Mobile  
number

Email

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



## 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?

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?

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 information guides and factsheets, call the Age UK Advice Line on **0800 169 65 65**.

# Life contacts

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**You probably have many people around you who form part of your life. These may include people such as 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 in your LifeBook. Also, if you are employed, or undertake voluntary work, these might be as useful to record as your membership of clubs and organisations such as trade unions.**

**Including a list of general local contacts, such as local police and emergency contact numbers for utility companies, can be extremely helpful. Most people have different details tucked away in various cupboards and drawers, but having them compiled in one place is what makes this record so useful.**

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

Contact type  
e.g. doctor

Name and  
address

Telephone  
number

Contact type  
e.g. doctor

Name and  
address

Telephone  
number

Contact type  
e.g. doctor

Name and  
address

Telephone  
number

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

Contact type e.g.  
colleagues

Name and  
address

Telephone  
number

Contact type e.g.  
colleagues

Name and  
address

Telephone  
number

Contact type e.g.  
colleagues

Name and  
address

Telephone  
number

Age UK's free information 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  
e.g. cleaner

Name and  
address

Telephone  
number

Contact type  
e.g. cleaner

Name and  
address

Telephone  
number

Contact type  
e.g. cleaner

Name and  
address

Telephone  
number

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

Contact type  
e.g. milkman

Name and  
address

Telephone  
number

Contact type  
e.g. milkman

Name and  
address

Telephone  
number

Contact type  
e.g. milkman

Name and  
address

Telephone  
number

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

Contact type  
e.g. club

Name and  
address

Telephone  
number

Contact type  
e.g. club

Name and  
address

Telephone  
number

Contact type  
e.g. club

Name and  
address

Telephone  
number

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

Contact type  
e.g. solicitor

Name and  
address

Telephone  
number

Contact type  
e.g. solicitor

Name and  
address

Telephone  
number

Contact type  
e.g. solicitor

Name and  
address

Telephone  
number

## 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 6565**

Local authority

Citizens Advice  
Bureau

Library

# Financial

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**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 also help your family or trusted person to look after your affairs should the need arise.**

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

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Here you can list the various financial accounts you have. This might include current accounts, savings accounts, mortgage accounts, ISAs, or National Savings. Please **do not** record the card number.

Organisation

Telephone  
number

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



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

Telephone number	Issuer	Telephone number	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	Telephone number	Organisation	Telephone number
1		4	
2		5	
3		6	

**Where do you keep documents relating to all these affairs?**

## Utility and key suppliers and accounts

This section 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.

Supplier

Telephone number

Water

Sewerage

Gas

Electricity

Telephone  
number

Mobile  
number

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

Telephone number

Renewal date

Life

Travel

Health/care

Other (e.g. warranties)

Organisation

Location of documents

Telephone number

Renewal date

# Documents

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As you go through life, you might collect a large number of legal documents along the way, such as birth, marriage, civil partnership certificates and a will.

In this section, you can record the existence and whereabouts of these documents. Knowing where these can be found will be essential for your family or executor in the future if they need to manage your affairs.

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## Document location

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

Birth certificate

Marriage/civil  
partnership certificate

Deeds to your  
property

Passport

Driving licence

Television licence

National Insurance  
card

NHS card

Bus pass or  
travel card

Other

**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 (PoA)** 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 PoA depending on where in the UK you reside and when you made your PoA.

**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 applicable document for you depends on where in the UK you reside.

**If you have any of these documents** it is 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 **Powers of Attorney, Wills and estate planning** and **How to be an executor**, provide practical information and advice.

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

## Others Executor(s)

(e.g. attorney, nominated person)

## Location

Will

Power of  
Attorney

Living will

## Funeral plan

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

# Possessions

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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. Your LifeBook is the ideal place for noting this down.

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

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## Property that you own

Address (if different to the given on page 3)

Postcode

Country

Telephone number

Are you the freehold owner or leaseholder?

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

If leaseholder, who is your landlord?

Landlord telephone number

Do you have a tenant?

Tenant telephone number



## 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

It may be worthwhile noting your significant possessions here. This often brings peace of mind, because if someone else has to 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 and books.

## Sentimental possessions

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

# Final wishes

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

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

## Funeral wishes

The organisation of your own funeral may not be easy to start, but what can be helpful is to ask yourself what would seem appropriate, such as who you would like to be there, what words you would like said, what readings and what kind of music you would want played.

You might even want to specify the names of the pieces of music that have touched you throughout life, that you'd like played or sung. There could well be those who you would want to undertake readings or whose names you would like mentioned in an address.

Above all, this LifeBook gives the perfect opportunity to state exactly what you want. It will be the ideal way to 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 will give yourself and the ones you care about most the satisfaction of knowing that they will be fulfilling your wishes wherever 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 (below).**

Now go through these steps, 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.

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 have a strong preference which funeral director is engaged?

I would want to be

Buried

Cremated

Do you carry an Organ Donor Card? Yes No

Have you arranged a burial plot?

Yes

No

Would you like a funeral service? 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.

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?

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

Do you mind where you are cremated?    Yes            No

Do you have a preference of where you would like to be cremated? 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, crematorium 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 prefer your body to be embalmed?    Yes            No

I would prefer 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

Telephone number

## 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 wish the notice to go into the following publications.

Name of newspaper

Name of newspaper

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 8751**.

### **After the funeral**

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

### **Special request**

I wish 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:

Thinking about the end of life can be difficult, but being well informed can help you consider all your options. Age UK's information guide **Thinking about end of life** takes you through the things you may want to think about. 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.

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 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. This could include information about your family or 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 video camera would be to leave a recording containing your 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 or 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 also call **The Silver Line, 24-hour helpline** that offers support and friendship on **0800 4 70 80 90**.

**Age UK is here for you.**

# 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** to obtain their copy.



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