



onefamily
modern family finance



for peace of mind

Everything in one place

Please make sure you keep this document in a secure location or consider asking your solicitor to store it for you.

My finances

Everything in one place

Whether it's completing your tax return or just getting your financial affairs in order, it's really useful to have all the information in one place.

To help ease this task, we've produced this booklet to help you keep a record of:

- Key contacts such as your solicitor, broker, accountant and mortgage provider
- Your bank and building society account details, credit cards and any loans
- All of your financial assets, be those cash savings, stocks and shares, bonds or mutual funds
- Details of your pensions and any properties you own
- Your insurance policies (e.g. buildings, contents, life and protection insurance)
- Your utility providers (e.g. energy, water and telecoms) and local council
- Other contracts such as any club memberships and other subscriptions
- The executors of your will, any power of attorneys and your desired funeral arrangements

If you need any further information or have a query regarding your Lifetime Mortgage or other policies with us, please don't hesitate to get in touch by either calling us on **0800 802 1645*** or email us at **OFLMprocessorsmailbox@onefamily.com**.

If you require this booklet, or any other correspondence from us in a different format (e.g. large format print), please let us know.

This form contains personal information, please ensure you keep it securely locked away in a safe place.

Personal Details

Name	
National Insurance Number	
Date of Birth	
Current Address	

Key Contacts

Mortgage Provider	
Bank	
Solicitor	
Broker	
Accountant	
Doctor	
Other	

Details of Will

My will is held with	
The will is dated	
The will was drawn up by	

Bank & Building Society Accounts

Name of Bank or Building Society	Account number and sort code	Branch address and contact details

Credit Cards & Loans

Credit or Loan Provider	Credit card number or Loan account number	Contact details

My Properties

Address	Mortgage provider	Outstanding loan amount	Approximate value

My Pensions

Provider name	Account number	Contact details

Utility Providers & Council Tax

(e.g. your local authority, energy and water providers and any telecoms)

Provider name	Account number	Contact details

Insurance Plans

(e.g. home and contents insurance, life insurance and income protection)

Provider name	Policy number	Contact details

Memberships & Subscriptions

(e.g. club memberships or magazine subscriptions)

Membership or Subscription provider	Membership or Subscription number	Address and contact details

Powers of Attorney

Date made	Has it been registered?	Name and address of Power of Attorney	Is it an EPA or LPA?	Is it for Property & Financial Affairs, Health & Welfare, or both?
	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> EPA <input type="checkbox"/> LPA	<input type="checkbox"/> Property & Financial Affairs <input type="checkbox"/> Health & Welfare <input type="checkbox"/> Both
	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> EPA <input type="checkbox"/> LPA	<input type="checkbox"/> Property & Financial Affairs <input type="checkbox"/> Health & Welfare <input type="checkbox"/> Both
	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> EPA <input type="checkbox"/> LPA	<input type="checkbox"/> Property & Financial Affairs <input type="checkbox"/> Health & Welfare <input type="checkbox"/> Both
	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> EPA <input type="checkbox"/> LPA	<input type="checkbox"/> Property & Financial Affairs <input type="checkbox"/> Health & Welfare <input type="checkbox"/> Both

Executors of Your Will

Name	Address	Telephone number / email

Funeral Arrangements

You may not want to think about what will happen after you die and the thought of putting it down in writing can be upsetting. The death of someone special can be a time of great distress for the bereaved, especially if they don't know of your wishes. By making your wishes for your funeral known beforehand, you can lessen the stress for those you leave behind. The following form may be of help to you.

You do not have to fill out all or any of the questions asked below, but the more you do answer, the more helpful it will be for your next of kin.

Cremation?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If yes:				
Ashes interred?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Ashes scattered?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Burial?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If yes where? (Legal restrictions will apply)				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				

Service?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If yes where?				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				
<input type="text"/>				

The Service

Music at entry? Yes No

Music at exit? Yes No

If yes what music?

1.

2.

3.

Sing hymns? Yes No

If yes which hymns?

1.

2.

3.

Reading? Yes No

Any other wishes?

Your Family Tree

The form is a dark blue rectangle containing several white sections for text entry. At the top is a section labeled 'You' with a white rectangular box below it. Below that is a section labeled 'Spouse / Partner' with another white rectangular box. The next row contains two sections: 'Parents' on the left and 'Grandparents' on the right, each with a large white rectangular box. The row below that contains two more sections: 'Children' on the left and 'Siblings' on the right, each with a large white rectangular box. At the bottom is a section labeled 'Other Connections' with a large white rectangular box.



**Please contact us
if you have
any questions**

-  www.onefamily.com
-  OFLMprocessorsmailbox@onefamily.com
-  **0800 802 1645***
-  **OneFamily, 16-17 West Street, Brighton BN1 2RL**

*Open 9am-5.30pm Monday to Friday. We might record your call to help improve our training and for security purposes. Calls to 0800 or 0808 numbers are free from UK landlines and personal mobiles. With business mobiles the cost will depend on your phone provider. If you'd like to know more, please ask your provider.

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