

Taylor & Taylor

FINANCIAL PLANNING



TAYLORED LIFE ALL IN ONE PLACE

*The easy way to store all your important
information and manage 'life admin'*

01204 365165

www.taylortaylor.co.uk



Entwistle Reservoir, Bolton



*'The hardest part of most jobs,
is starting them'*

FRANK TAYLOR



Rivington Pike, Bolton



DEATH ISN'T A PLEASANT SUBJECT TO TALK ABOUT, BUT IT IS AN IMPORTANT ONE.

Losing a partner, family member or close friend is a difficult experience, made even harder when their personal and financial information has not been organised.

Your Taylored Life is a working document that has been designed to help keep all of this information in one place. Not only will this ensure that loved ones can properly deal with the affairs of the deceased, it will help someone take over if you are unable to deal with them yourself.

This document should be filled in as carefully and as accurately as possible. Once complete, tell someone you trust where to access it, along with any important items such as:

- *Wills*
- *Powers of Attorney*
- *Letter of Wishes*
- *Any other documents needed for your family to properly fulfil your wishes*



Queens Park, Bolton

1. Personal details

	You	Your spouse / partner, next of kin
Full name		
Date of birth		
NI number		
Address		
Tel no.		
Mobile no.		
Email		

Where do you keep the property deeds to your main home?



Smithills Hall, Bolton

2. Your children, parents, dependents or other close family

Relationship		Relationship	
Full name		Full name	
Date of birth		Date of birth	
Address		Address	
Tel no.		Tel no.	
Mobile no.		Mobile no.	
Email		Email	

Relationship		Relationship	
Full name		Full name	
Date of birth		Date of birth	
Address		Address	
Tel no.		Tel no.	
Mobile no.		Mobile no.	
Email		Email	

Notes

3. Your pets

Name		Name	
Type / breed		Type / breed	
Birth date		Birth date	
Male / Female		Male / Female	
Chip number		Chip number	
Special needs		Special needs	

Name		Name	
Type / breed		Type / breed	
Birth date		Birth date	
Male / Female		Male / Female	
Chip number		Chip number	
Special needs		Special needs	

Name of vet		Tel no.	
Location of vaccination records			
Insurance company			
Tel no.		Policy no	
Your wishes in case of emergency			

**Detail your wishes for your pet(s), in the event of illness or death
(include name and contact details)**

4. Your close friends

Full name		
Address		
Tel no.		
Mobile no.		
Email		

Full name		
Address		
Tel no.		
Mobile no.		
Email		

Full name		
Address		
Tel no.		
Mobile no.		
Email		

Where do you keep your address book / contacts list?

5. Medical information and health conditions

	You	Your spouse / partner, next of kin
Details of any medical conditions that might affect emergency treatment		
Details of any medication taken		
Allergies or allergic reactions to medication		
Location of medication		
Do you have a pacemaker or similar appliance?		
Donor card status & location		
Blood group		
GP name		
GP address		
GP tel no.		

Notes

6. Important life contacts

Legal and financial contacts	Financial planner, accountant, solicitor etc.		
Contact type		Contact type	
Name		Name	
Address		Address	
Tel no.		Tel no.	
Email		Email	

Contact type		Contact type	
Name		Name	
Address		Address	
Tel no.		Tel no.	
Email		Email	

Notes

Physical health contacts	Dentist, optician, pharmacist, district nurse etc.		
Contact type		Contact type	
Name		Name	
Address		Address	
Tel no.		Tel no.	
Email		Email	

Contact type		Contact type	
Name		Name	
Address		Address	
Tel no.		Tel no.	
Email		Email	

Work contacts	Boss, manager, colleague, business partner etc.		
Contact type		Contact type	
Name		Name	
Address		Address	
Tel no.		Tel no.	
Email		Email	

Home contacts	Cleaner, gardener, decorator, home help, carer, neighbours etc.		
Contact type		Contact type	
Name		Name	
Address		Address	
Tel no.		Tel no.	
Email		Email	

Contact type		Contact type	
Name		Name	
Address		Address	
Tel no.		Tel no.	
Email		Email	

Notes

Local traders	Milkman, newsagent, taxi firm, handyman, builder, plumber etc.		
Contact type		Contact type	
Name		Name	
Address		Address	
Tel no.		Tel no.	
Email		Email	

Contact type		Contact type	
Name		Name	
Address		Address	
Tel no.		Tel no.	
Email		Email	

Notes

Organisation contacts	Clubs, membership groups, social, library etc.		
Contact type		Contact type	
Name		Name	
Address		Address	
Tel no.		Tel no.	
Email		Email	

Contact type		Contact type	
Name		Name	
Address		Address	
Tel no.		Tel no.	
Email		Email	

Notes

Utility contacts	Electricity, gas and water suppliers, local authority for council tax etc.		
Contact type		Contact type	
Account no		Account no	
Tel no.		Tel no.	
Email		Email	

Contact type		Contact type	
Account no		Account no	
Tel no.		Tel no.	
Email		Email	

Contact type		Contact type	
Account no		Account no	
Tel no.		Tel no.	
Email		Email	

Notes

7. Financial Banks, building society, premium bonds, etc		
	You	Your spouse / partner
Organisation		
Tel no.		
Email		
Account type		
Account no		
Details		
Organisation		
Tel no.		
Email		
Account type		
Account no		
Details		
Organisation		
Tel no.		
Email		
Account type		
Account no		
Details		

7. Financial (continued)

	You	Your spouse / partner
Organisation		
Tel no.		
Email		
Account type		
Account no		
Details		

Organisation		
Tel no.		
Email		
Account type		
Account no		
Details		

Organisation		
Tel no.		
Email		
Account type		
Account no		
Details		

Notes

8. Debts Mortgages, car loans etc.		
	You	Your spouse / partner
Organisation		
Tel no.		
Email		
Type		
Account no		
Details		

Organisation		
Tel no.		
Email		
Type		
Account no		
Details		

Notes

9. Pensions in payment List provider and account number

	You	Your spouse / partner
State Pension		
Work pensions		
Private pensions		
Annuities		

10. Credit & store cards Don't list card numbers

	Issuer	Owner
Card 1		
Card 2		
Card 3		
Card 4		
Card 5		
Card 6		
Card 7		
Card 8		
Card 9		
Card 10		

Where do you keep the documents relating to these affairs?

11. Insurance policies**House contents, car, life, private medical etc.**

	You / your spouse / both	You / your spouse / both
Type		
Organisation		
Policy no.		
Tel no.		
Email		
Renewal date		

Type		
Organisation		
Policy no.		
Tel no.		
Email		
Renewal date		



11. Insurance policies continued

	You / your spouse / both	You / your spouse / both
Type		
Organisation		
Policy no.		
Tel no.		
Email		
Renewal date		

Type		
Organisation		
Policy no.		
Tel no.		
Email		
Renewal date		

Type		
Organisation		
Policy no.		
Tel no.		
Email		
Renewal date		

Where do you keep the documents relating to these affairs?

12. Possessions / Assets

Property - rental properties only

	You	Your spouse / partner
Address		
Is property rented out?		
Tenant tel no.		

Where are the property deeds kept?

Notes

Vehicles	Cars, motorbikes, campervans, caravans etc.	
	Vehicle 1	Vehicle 2
Type		
Name of keeper		
Make & model		
Registration no.		
Service location		
Next service due		
Warranty details		

	Vehicle 3	Vehicle 4
Type		
Name of keeper		
Make & model		
Registration no.		
Service location		
Next service due		
Warranty details		

Where are the motor insurance documents kept?

It is useful to make a note of everything to ensure nothing gets lost, and anyone dealing with your affairs is fully informed.

It is useful to keep a letter of wishes with your will, so everybody knows how to distribute the items listed below.

Other significant possessions - Jewellery, art, antiques, furniture, classic vehicles etc

You	Your spouse / partner

Sentimental possessions - Photographs, memorabilia, letters / cards etc.

You	Your spouse / partner

Notes

Details of how you wish to distribute your possessions and when, will be contained in documents like your Will, or in Trust Deeds.

How you would like your affairs to be managed, if you cannot do this yourself, should be detailed in Powers of Attorney.

13. Important documents

Will

	You	Your spouse / partner
Have you made a will?		
Names of Executors		
Address of Executors		
Tel no.		
Email		

Names of Executors		
Address of Executors		
Tel no.		
Email		

Where is your original Will kept?

Living Will		
	You	Your spouse / partner, next of kin
Do you have a Living Will or Advance directive?		
Do you have a letter of wishes?		

Lasting Power of Attorney		
	You	Your spouse / partner, next of kin
Have you completed a Financial Power of Attorney?		
Name(s) of Attorney(ies)		
Have you completed a Health & Welfare Power of Attorney?		
Name(s) of Attorney(ies)		

Notes

Where is the documentation for the above items kept?

Trust		
	You	Your spouse / partner
Have you set up a Trust?		
Details		
Names of Trustees		
Address of Trustees		
Tel no.		
Email		

Names of Trustees		
Address of Trustees		
Tel no.		
Email		

Notes

Record the location of other documents in this section. This will help someone else look after your affairs if you can't.

You may wish to collect these documents and store them in one place for convenience.

Document locations

	You	Your spouse / partner, next of kin
Birth certificate		
Marriage certificate		
Property deeds		
Driving licence		
National Insurance card		
NHS card		
Bus pass		

Notes

One of the hardest things for your loved ones to deal with after you have gone will be the arrangements of how to say goodbye.

This can be made so much easier if they know what arrangements you would have liked, and whilst it may not be possible to fulfil all your wishes, they will know where to begin at what will be a difficult time. The organisation of your own funeral may be emotionally difficult.

A good place to start is to think of who you would like to be there; what you would like to be said and by whom; what readings and what music would you like.

You might also like to think about your epitaph and how you would like your family to celebrate your life.

So that your loved ones know what you have decided – please choose the correct statement below:

14. Final wishes

Will

	You	Your spouse / partner
I have already considered my funeral arrangements and / or prepared a funeral plan		
I have no preference and wish my loved ones to do what they think is best		
I will describe my funeral wishes in a seperate document, held alongside this manual		

15. Additional help and support - click each icon to visit the website



Cruse Bereavement Care
0844 477 9400
www.cruse.org.uk



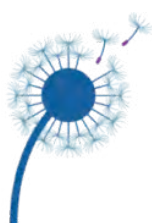
WAY Widowed and Young
www.widowedandyoung.org.uk



Age UK
0800 169 6565
www.ageuk.org.uk



Samaritans
08457 909090
www.samaritans.org.uk



**Association of
Natural Burial Grounds**
01962 712690
www.naturaldeath.org.uk



Good Funeral Guide
01527 595358
www.goodfuneralguide.co.uk

*'Above and beyond,
with everyone, everytime'*





OUR CONTACT DETAILS

Taylor & Taylor Financial Planning

94 Chorley New Road
Bolton
BL1 4DH

Telephone : 01204 365165

Email : info@taylortaylor.co.uk

Website : www.taylortaylor.co.uk

HOW TO FIND US

From M60 Jct 15:

Exit the M60 at Junction 15 and follow the signs for M61/A666 (Bolton). Stay in the right hand lane as the motorway bears to the right heading towards Bolton and the A666. Continue on the A666 (St. Peter's Way) towards Bolton town centre. Turn left onto the A673 (Topp Way). At the crossroads with the B6205, turn right onto the A673 (St. George's Road). At the next traffic lights, turn left onto the A673 (Chorley New Road). Taylor & Taylor are located on the right.

From M61 Jct 6:

Exit the M61 at Junction 6 and follow the signs for A6027 (Bolton). At the first roundabout take the second exit staying on the A6027. Continue past the BWFC Stadium and at the next roundabout take the second exit onto the A673 (Chorley New Road). Continue on Chorley New Road, past Bolton School. Taylor & Taylor are located on the left.

From M65 Jct 4:

Exit the M65 at Junction 4 and follow the signs for A666 (Bolton and Darwen). Continue southbound on the A666 towards Bolton town centre. Follow the one-way system and then turn right onto the A673 (Topp Way). At the crossroads with the B6205, turn right onto the A673 (St. George's Road). At the next traffic lights, turn left onto the A673 (Chorley New Road). Taylor & Taylor are located on the right.

Car Parking

Our car park is located at the rear of the building.

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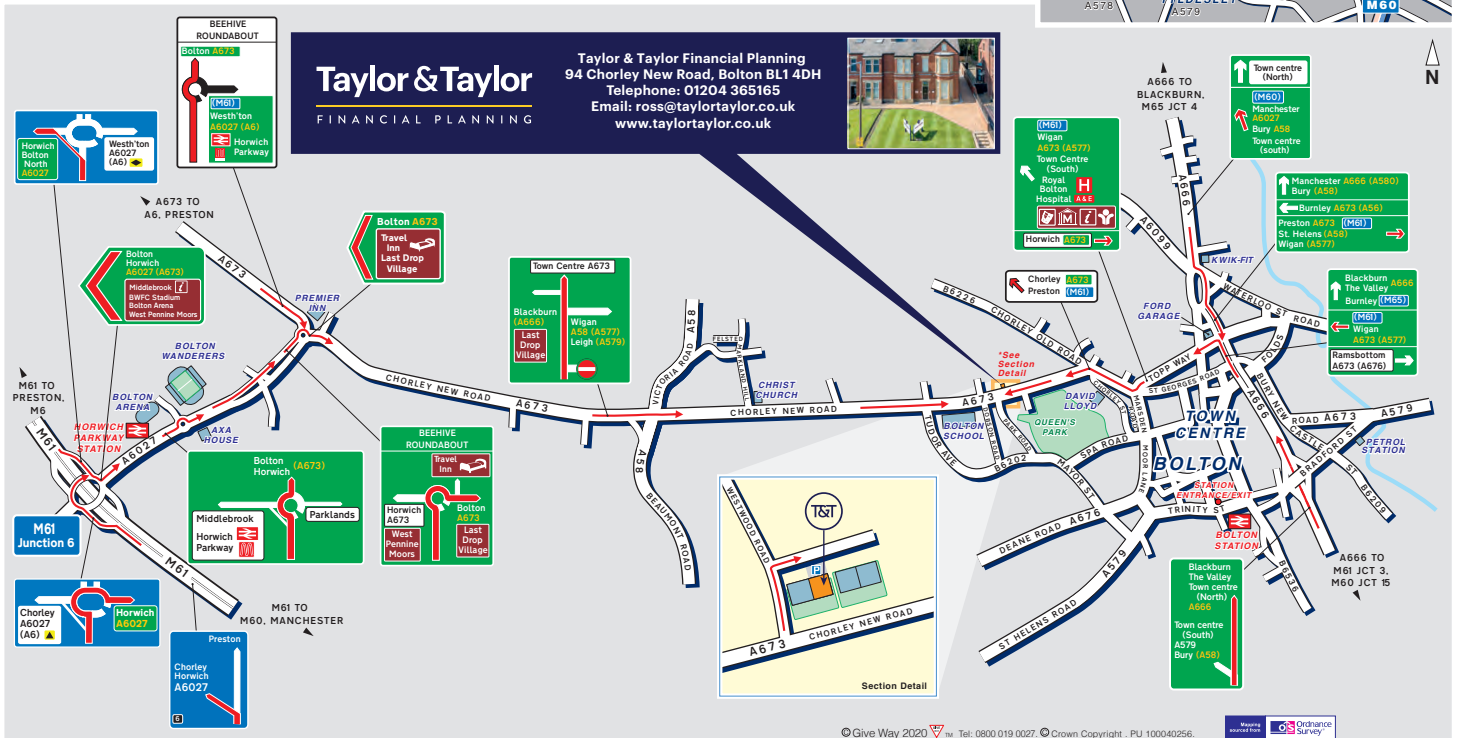
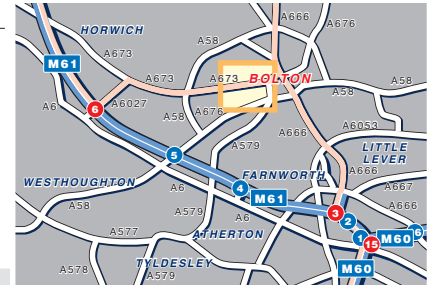


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Blank lined paper with a faint circular logo containing the text 'T&A' in the bottom right corner.

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