

Later-Life Booklet

Enjoy the peace of mind that comes from knowing your important information is organised, accessible, and ready for when it's needed most.





What is the Later-life Booklet?

At Talbots, we understand that the process of putting your affairs in order can feel daunting. That's exactly why we've created this Later-Life Booklet —to give you and your loved ones a simple and reassuring way to record the information that matters most.

Life involves juggling a great deal of personal, financial and practical information, and it isn't always easy to keep track. This booklet brings everything together in one secure place. You can use it to record important details about your day-to-day life, your finances, your personal wishes, and even your family history. Whether you need to check information about your utilities, your accounts, your health arrangements or your pets, you'll know exactly where to find it.

Keeping this information in one place also provides invaluable support for those you trust. If your loved ones ever need to help you or manage your affairs, this booklet gives them clear, accurate guidance at a time when clarity and certainty will truly matter.

We recommend storing your booklet alongside your copies of your Wills and Lasting Powers of Attorney. Please try to keep the information up to date, and if any significant changes occur, let us know using the forms provided at the back of the booklet.

Keep it safe. Let someone you trust know where it is. And enjoy the peace of mind that comes from knowing your important information is organised, accessible, and ready for when it's needed most.

Booklet Contents

Personal Details

Record your important personal, medical and contact information in one convenient place.

01

Important Contacts

Keep details of your family, friends, pets and trusted professionals close at hand when they're needed most. Ensure to double check you have the most up to date information.

02

Document Location

Make it easy to locate essential documents such as your Will, Powers of Attorney and other key paperwork.

03

Property and Finances

Create a clear overview of your accounts, assets, property, pensions, insurance and household arrangements.

04

Final Wishes

Share your funeral preferences, organ donation decisions and personal wishes for the future.

05

Additional Information

Use this section to make notes on any extra information, reminders or details you would like your loved ones to know.

06

Personal Details

Forename(s)

Last Name

Previous Names

Date of Birth

NI Number

Address

Home Number

Mobile

Email Address

Email Accounts

Social Media

Subscriptions

NHS Number

Health Conditions

Medication

Allergies

Location of Medication

Important Contacts

Your Spouse, Partner or Next of Kin

Forename(s)	
Last Name	
Date of Birth	
Address	
	Postcode
Mobile Number	
Email Address	

Your Children

Names	Date of Birth	Address	Contact Details

| Other Close Family Members

Names	Address	Contact Details

| Close Friends

Names	Address	Contact Details

| Your Pets

Name		Date of Birth	
Type/Breed		Sex	Male / Female
Special Needs			
Microchip			
Name of Vets			
Telephone			
Insurance			
Policy Number			
Location of pet records			

Name		Date of Birth	
Type/Breed		Sex	Male / Female
Special Needs			
Microchip			
Name of Vets			
Telephone			
Insurance			
Policy Number			
Location of pet records			

Wishes in case of emergency

| Professional Contacts

Main
Work
Contact

Business
Partner
Contact
Details

Solicitor
Details

Accountant
Details

Financial
Adviser
Details

Other
Professional
Contact
Details

Document Location

Wills

Lasting
Powers of
Attorney

Funeral
Plan

House
Deeds

Passport

Driving
License

Birth
Certificate

Marriage
Certificate

Other
Important
Documents

| Bank and Building Society Accounts

Bank	Account Number	Sort Code	Account Type	Joint/Sole

| Investments and Other Assets

Organisation	Account Number	Description	Owned By	Joint/Sole

| Property

Address	Location of Deeds	Owned By

| Personal Possessions

Item	Additional Information	Location of Item

| Pensions

Organisation	Account Number	Type of Pension

| Liabilities

Mortgage/Equity Release	
Loans	
Water	
Gas	
Electric	
Landline	
Mobile Phone	
Internet/Broadband	
Cable/Satellite TV	
Memberships	
Subscriptions	

| Insurance Policies

	Organisation	Policy Number
House Insurance		
Car Insurance		
Life Insurance		
Health Insurance		

Final Wishes

I have prepared a Will with Talbots Law. This document sets out my wishes in relation to the arrangements for my funeral and any memorial service. I realise that I cannot determine how you will make the arrangements, and that I must rely on your discretion, but the following notes are intended to guide you when making the necessary arrangements

My Details

Full Name _____

Address _____

The person most likely to be making my funeral arrangements is:

Full Name _____

Address _____

Telephone _____ Email: _____

Relationship to me: _____

Funeral Director

I would like the following funeral director to deal with my wishes:

Funeral Director _____

Address _____

I have a pre-paid funeral in place. Reference (please state): _____

Funeral Instructions

I would like to be: Buried Cremated Other (state): _____

If buried, I wish to be buried at the following cemetery / natural burial ground (please state plot number if existing):

No preference Location: _____

If cremated, I wish for my ashes to be:

No preference Returned to my family Scattered at: _____

Interred at: _____ Other (state): _____

I would like the following type of coffin or casket:

No preference Wood Other (e.g. wicker, cardboard etc) _____

| Organ Donation

The rules in England about organ donation changed on the 20th May 2020. You still have a choice about whether you donate your organs on your death, but England has changed to an “opt out” system.

Under the new system all adults agree to become an organ donor on death unless they have made it known that they don't wish to donate. If no organ donation decision is recorded, and you are not in one of the excluded groups*, then it is considered that you agree to donate your organs when you die.

| Organ donation and beliefs

If you have any questions about whether your faith or beliefs affect your ability to become an organ donor then further guidance can be found on organdonation.nhs.uk or consult an advisor from your religion or belief group.

It is really important to discuss your donation choice with your family so that they are aware of your wishes. Even if you have recorded your decision on the NHS Organ Donation Register, your family will always be involved in organ donation and they could override your decision if they don't know what you want. It is better to talk to your family and leave them certain. You can also record your wishes below.

| How do I register a decision to donate or not to donate?

Your decision can be registered on the organ donation website organdonation.nhs.uk. Your decision can be amended or withdrawn at a later date.

If you don't want to make a decision about organ donation yourself you can appoint someone else to make that decision for you. The form can be found on the organdonation.nhs.uk website.

I DO / DO NOT (tick as applicable) wish to donate my organs.

I wish to donate my (tick those that do not apply) heart, lungs, kidneys, liver, corneas, pancreas, small bowel, tissue (includes skin, bone, eyes, tendons, heart valves, arteries).

Please note that this confirmation is not a substitute for registering your decision with the NHS Organ Donation Register.

*Excluded groups – under 18s, people who lack capacity, visitors to England and people who have lived in England for less than 12 months before death.

Get in touch



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