



SOTERIA
- TRUSTS -

DEPARTED

UNLOCKING MY ESTATE

What to do after I'm gone

An e-document for recording my personal details and wishes on how to organize my affairs and deal with everyday practical matters after I die.

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INTRODUCTION

This e-document is for recording and storing your personal information and wishes for its future use by your family, friends, colleagues and acquaintances following your death. It doesn't serve as a Will or as a replacement to your existing Will, but more to deal with the everyday things that a Will doesn't deal with such as recording the telephone number of your bank and the log in details etc. It has been created so that those who you want to deal with your affairs after your demise, can do so efficiently and quickly without having to jump through layers of red tape. We hope you will find it useful and that it can be one day used to provide detail to those people who you want to have it. Ultimately, they should be able to carry out your wishes exactly how you would want them to.

HOW TO USE THIS E-DOCUMENT

Fill in as many details as you can. The more information those who are left behind have, the easier it will be for them to respect your wishes and arrange things in a way that you would like.

If you come across a section that doesn't apply to you, you can either draw a dash and a N/A (-N/A-) or leave it blank. If any aspects of your life or your wishes are not covered in this e-document, use the additional space at the back to record them.

You don't have to finish recording all your information and wishes in one go, so take as much time as you need. Once you have recorded all your details, let us have the completed document back and it will be stored securely and safely in our e-safe.

You may need to update the document from time to time. If your personal circumstances change or if you want to change your wishes, please request the original from us and we will send it to you within one business day. You can then update the details and let us have the amended version back for safe storage.

It's a good idea to tell those who you identify within about the existence of the document, and how they can retrieve the section relevant to them when the time comes. This way they will know exactly where to look for it when you pass away or if you become unable to communicate.

If you are a business owner or self-employed, make sure you communicate how your business should be looked after when you're no longer in charge. Although this document has some space to record your business information, it may not be enough for your needs. If this is the case, please contact us, and we will provide you with a Business Supplement. You can use the document to record your business's important details and instructions on what to do next.

Record all the contact details of your family, friends and other relevant people in the relevant e-book section and keep the information updated.

My passwords – Record all your online passwords in a secure, password-protected area of your PC, notebook or smartphone and keep them regularly updated. You can choose to record all of your security details and login processes in this e-document or you can record the name of the machine where the security information is stored and have the access password (a single password that is used to access the relevant PC and all of the relevant details when they are needed) and hold it securely in our vault. You should advise a short list of people who should be made aware of it following your death.

**PLEASE NOTE THAT THIS E-DOCUMENT IS NOT A WILL OR A LEGAL DOCUMENT.
IT DOES NOT REPLACE A WILL.**

The date of completing this document

Date of last update

MY DETAILS

MY PERSONAL DETAILS

Full Name _____

Maiden Name (if applicable) _____

Address
(If rented, landlord's contact details) _____

Mobile phone _____

Landline _____

Email 1 _____

Email 2 _____

Date of birth _____

TIN Number (Tax) _____

National Insurance Number _____

Next of Kin's name _____

Relationship to me _____

His/Her contact details _____

Please use the notes section at the end of this document if needed.

DETAILS OF MY IMMEDIATE FAMILY

My marital status _____

My partner/spouse's name,
e-mail address and contact number _____

My children's names,
e-mail addresses and contact numbers _____

My stepchildren's names,
e-mail addresses and contact numbers

My grandchildren's names,
e-mail addresses and contact numbers

My father's name,
e-mail address and contact numbers

My mother's name,
e-mail address and contact numbers

Please use the notes section at the end of this document if needed.

WHEN I PASS AWAY

Please let these people know

	Relationship to me	Contact details
Name 1	<hr/>	<hr/>
Name 2	<hr/>	<hr/>
Name 3	<hr/>	<hr/>
Name 4	<hr/>	<hr/>
Name 5	<hr/>	<hr/>
Name 6	<hr/>	<hr/>

	Relationship to me	Contact details
Name 7	_____	_____
Name 8	_____	_____
Name 9	_____	_____
Name 10	_____	_____
Name 11	_____	_____
Name 12	_____	_____
Name 13	_____	_____
Name 14	_____	_____
Name 15	_____	_____

Please use the notes section at the end of this document if needed.

FUNERAL ARRANGEMENTS

I wish to be

- Buried
- Cremated
- Other _____

The following should organise my funeral

1. Name and contact details _____

2. Name and contact details _____

Do you have a chosen funeral director? If so, who? _____

What kind of funeral would you prefer (religious, non-religious, other, let the organiser choose)?

My funeral will be paid for:

- By the person organising
- I have a funeral plan, it is located _____
- Via the proceeds of my Will, if available
- From funds I have allocated in _____

Please use the notes section at the end of this document if needed.

MY PETS

I would like the following people to look after my pets following my death:

Pet name	Person's name and contact details
1. _____	_____
2. _____	_____
3. _____	_____

Any specific details about my pets that they will need to know: _____

Please use the notes section at the end of this document if needed.

OTHER PEOPLE TO KNOW ABOUT

My financial adviser is _____

My lawyer is _____

My accountant is _____

Other professionals I deal with are _____

Heads of religious communities I belong to _____

Please use the notes section at the end of this document if needed.

IMPORTANT DOCUMENTS AND WHERE TO FIND THEM

Passport number _____ Where it is _____

My driving license number _____ Where it is _____

Important documents (birth certificate, marriage certificate, divorce papers) are located:

The password to my computer is _____

The file containing all other important login and passwords is called _____

and its saved in (please provide a location on your computer, for example: Desktop) _____

My phone PIN number is _____

Please use the notes section at the end of this document if needed.

I HAVE WRITTEN MY LAST WILL AND TESTAMENT

It is located: _____

The Firm to consult with relating to my Will is **Soteria Trusts** (www.soteriatrusters.com)

Please use the notes section at the end of this document if needed.

ASSETS & LIABILITIES

MY BANK DETAILS

	Bank 1	Bank 2	Bank 3	Bank 4
Name				
Sort code				
Account number				

Passcodes for online banking and phone banking are located in my file containing login and passwords. If not then

Please use the notes section at the end of this document if needed.

MY PROPERTY

Property 1

Address (city and country) _____

Ownership Single or Joint with _____

Home or Investment

If investment:

Is it rented? If yes, please provide agent or tenant details _____

Mortgage? If yes, please provide the name of the bank and account number _____

Property 2

Address (city and country) _____

Ownership Single or Joint with _____

Home or Investment

If investment:

Is it rented? If yes, please provide agent or tenant details _____

Mortgage? If yes, please provide the name of the bank and account number _____

Property 3

Address (city and country) _____

Ownership Single or Joint with _____

Home or Investment

If investment:

Is it rented? If yes, please provide agent or tenant details _____

Mortgage? If yes, please provide the name of the bank and account number _____

Property 4

Address (city and country) _____

Ownership Single or Joint with _____

Home or Investment

If investment:

Is it rented? If yes, please provide agent or tenant details _____

Mortgage? If yes, please provide the name of the bank and account number _____

Please use the notes section at the end of this document if needed.

MY INVESTMENTS (SHARES, UNIT TRUSTS, MUTUAL FUNDS ETC)

	Firm 1	Firm 2	Firm 3	Firm 4
Name of firm				
Account number				
Value				

Please use the notes section at the end of this document if needed.

MY LIFE INSURANCE POLICIES

	Insurance Company 1	Insurance Company 2	Insurance Company 3	Insurance Company 4
Policy number				
Sum assured				

Please use the notes section at the end of this document if needed.

MY CHATELS & PERSONAL EFFECTS

List any personal property and where the ownership details are located

Car _____

Caravan _____

Holiday home _____

Boat _____

I have a storage unit, it is located at _____

I have valuable personal possessions located

In my safe _____

In a safety deposit box located at _____

Somewhere else Details: _____

Please use the notes section at the end of this document if needed.

MY CREDIT CARDS

	Credit Card 1	Credit Card 2	Credit Card 3	Credit Card 4
Issuer				
Name on card				
Card number				
PIN <i>can be found in my file containing login and passwords, if not, then...</i>				

Please use the notes section at the end of this document if needed.

MY LOANS

	Loan 1	Loan 2	Loan 3	Loan 4
Firm				
Account				
Amount				

Please use the notes section at the end of this document if needed.

MY SOCIAL MEDIA MEMBERSHIPS

Please close and cancel all of my social media accounts, online memberships and subscriptions (Facebook, Twitter, LinkedIn, Instagram, Tik Tok, YouTube...)

URL 1 _____ Login _____ Password _____

URL 2 _____ Login _____ Password _____

URL 3	_____	Login _____	Password _____
URL 4	_____	Login _____	Password _____
URL 5	_____	Login _____	Password _____
URL 6	_____	Login _____	Password _____
URL 7	_____	Login _____	Password _____
URL 8	_____	Login _____	Password _____
URL 9	_____	Login _____	Password _____
URL 10	_____	Login _____	Password _____
URL 11	_____	Login _____	Password _____
URL 12	_____	Login _____	Password _____
URL 13	_____	Login _____	Password _____
URL 14	_____	Login _____	Password _____
URL 15	_____	Login _____	Password _____
URL 16	_____	Login _____	Password _____
URL 17	_____	Login _____	Password _____
URL 18	_____	Login _____	Password _____
URL 19	_____	Login _____	Password _____
URL 20	_____	Login _____	Password _____

Please use the notes section at the end of this document if needed.

MY BUSINESS

I own the following business assets _____

Company name _____

Other directors _____

Share holding _____

My Wishes as to what should happen to the business (see my Will)

Please use the notes section at the end of this document if needed.

MISCELLANEOUS

Any miscellaneous details not mentioned earlier?

ANY FINAL WORDS YOU HAVE FOR THE IMPORTANT PEOPLE IN YOUR LIFE?

OTHER HELPFUL THINGS TO DO

Make a Will – If you haven't already done so already, make a Will and remember to review and update it regularly. This document is not a substitute for a Will, it compliments it and allows you to use and remember many different people for practical rather than personal reasons.

Make a Living Will – A Living Will is a document that sets out how you would want to be treated and by whom in the event of you becoming disabled or no longer have the capacity to make decisions or take care of yourself.

Set up a Power of Attorney – This is a legal document that allows another person to make decisions for you, or act on your behalf if you are no longer able to do so yourself, or if you no longer wish to do so.

Donation of organs – If you want any of your organs to be put to use after your death then you should register with the various organizations and make sure that you carry their donor cards at all times.

PROCESS FOR THOSE LEFT BEHIND

There are two ways to use this document.

1. You can fill out the information and simply give it to someone you trust.
2. Store it securely in a digital format or printed with your Will upon subscribing to the Soteria Trusts Will Storage Service. Contact wills@soteriatrusters.com for more information.

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