ESSENTIALS

S

Sam

Prepared 6 October 2026

PRIVATE · KEEP SAFE

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CHAPTER I

About You

The facts — personal details, identifiers, health and wishes.



Samuel Hartley

Known as Sam

Born 12 April 1958 in Ashby Green

PERSONAL DETAILS

Full legal name	Samuel Hartley
Preferred name	Sam
Date of birth	12 April 1958
Place of birth	Ashby Green
Address	12 Orchard Lane, Ashby Green
Relationship status	Married
Partner	Maggie Hartley

IDENTIFIERS

National Insurance	QQ123456C
Passport	123456789
Driving licence	HARTL504128S99AB

HEALTH

GP surgery	Castle Street Surgery
Allergies	Penicillin
Medications	Amlodipine, 5mg each morning. Atorvastatin, 20mg at night.
Conditions	High blood pressure, watched by the surgery since 2019.

WISHES

FAREWELL

Something short and cheerful, then everyone to the Red Lion.

OTHER WISHES

Keep the Sunday lunches going, even if it's just soup. Maggie stays in the house for as long as she wants to; nobody is to talk her into moving. The allotment goes to Pat, who's had his eye on the rhubarb for years. Sort through the shed together, not in a rush, and keep the tools that are any good. And take Biscuit to the beach once a year for me.

CHARITIES

Hillside Dog Rescue
Where Biscuit came from

CHAPTER II

People and Pets

How to reach each person, the roles they hold, and the care the pets need.

PEOPLE



Maggie

Wife

Partner · Next of kin · Power of attorney

07700 900123

Born 3 September 1960



Sarah

Daughter

Child · Executor · Power of attorney

07700 900456



Tom

Son

Child

07700 900789



Alan Hartley

Brother

07700 900654

Two years younger, and three hundred miles away. Rings every Sunday after the football.



Doreen Clarke

Next door

Key contact

01632 960820

Has a spare key and takes the bins out when we're away. Biscuit knows her.



Jack

Grandson



Lily

Granddaughter



Pat Okafor

Oldest friend

Key contact

07700 900321

Knows where the fishing gear is.

RW

Ruth Webb

Solicitor

Key contact

01632 960700

Hartley & Webb, Castle Street. She drew up the will and holds the original.

PETS



Biscuit

Dog · Border terrier

Looked after by Tom

Vet: Meadowbank Vets, 01632 960123

Two walks a day. Won't eat until he's been out. Scared of the hoover.

CHAPTER III

Will and Home

The will, power of attorney and home, and what to do when the time comes.

WILL

Has a will	Yes
Kept	With the solicitor; copy in the blue folder
Executor	Sarah · 07700 900456

POWER OF ATTORNEY

Has one	Yes
Covers	Money and property, health and care
Power of attorney	Maggie · 07700 900123 Sarah · 07700 900456

HOME

Home	Owned outright
Joint names	Yes

NEXT OF KIN

Name	Maggie
Contact	07700 900123

WHEN THE TIME COMES

Tell Us Once lets you tell most government services about a death in one go: gov.uk/tell-us-once. It covers England, Wales and Scotland; in Northern Ireland, contact the Bereavement Service via nidirect.

gov.uk asks that you get permission from any surviving spouse or civil partner, next of kin, executor or administrator, or anyone claiming joint benefits before sharing their personal details.

OFFICIAL GUIDANCE

Dealing with someone's estate is done differently in each part of the UK: it's called probate in England, Wales and Northern Ireland, and confirmation in Scotland. Inheritance Tax is the same everywhere. The official guidance is here:

England and Wales	gov.uk/when-someone-dies
Scotland	mygov.scot/death
Northern Ireland	nidirect.gov.uk/articles/probate
Inheritance Tax	gov.uk/inheritance-tax

This isn't legal or tax advice. For anything that has to be legally right, speak to a solicitor.

CHAPTER IV

Accounts and Policies

Every account, policy and provider, with the numbers someone will need.

BANKS, SAVINGS AND PENSIONS

A1 **Joint current account**
With Northgate Building Society
Sort code 12-34-56
Account 12345678
Pension comes in; the bills go out
Contact: 01632 960200

A2 **Cash ISA**
With Harbour Bank
Sort code 65-43-21
Account 87654321
Rainy-day money
Contact: 01632 960300

P1 **Railway pension**
With Fairway Pensions
Member number FP-000123
Paid monthly; Maggie gets half if I go first
Contact: 01632 960400

YOUR HOME

D2 **House deeds**
Kept: Grey filing box, spare room

P2 **Home and contents**
With Meadow Insurance
Renews 1 March 2027
Kept: Blue folder, spare room
Contact: 01632 960500

YOUR VEHICLES

D8 **Car logbook (V5C)**
Kept: Kitchen drawer by the back door

P3 **Car insurance**
With Meadow Insurance
Registration AB12 CDE
Renews or due 15 June 2027
Contact: 01632 960500

BILLS AND SERVICES

A3 **Gas and electricity**
With Brightside Energy
Monthly direct debit
Contact: 01632 960600

A6 **Council tax**
With Ashby Green District Council
Band D. Single person discount if Maggie is on her own.
Ten monthly instalments, April to January
Contact: 01632 960620

A5 **Water**
With Ashby Water
Quarterly, straight out of the current account
Contact: 01632 960610

A7 **Broadband and the landline**
With Larkfield Broadband
Renews 20 January 2027
Monthly direct debit
Contact: 01632 960630

A8 **TV licence**
With TV Licensing
Renews 1 September 2027
Renews each September
Free over 75 only if you get Pension Credit, which we don't.

YOUR ONLINE LIFE

A4 **Email**
Sarah knows how to get into it
Password is in the password manager; Sarah is the emergency contact.

A9 Mobile phone

With Kestrel Mobile
Rolling monthly, nothing to pay off
Contact: 07700 900142
The PIN to unlock the phone is on the card with the passwords.

A10 Where the passwords are kept

Everything else opens from here
Kept: The little red book in the bureau, top drawer
Maggie knows where it is. Sarah has the only other key to the bureau.

A11 The photographs

Forty years of them; nothing is anywhere else
Kept: The laptop, and the blue hard drive beside it
Not backed up anywhere online. Somebody please see to that.

IMPORTANT PAPERS

D1 Will

Solicitor: Hartley & Webb Solicitors
Kept: With the solicitor; copy in the blue folder
Contact: 01632 960700

D3 Lasting powers of attorney

Kept: Bureau, top drawer

D4 Birth certificate

Kept: Blue folder, spare room

D5 Marriage certificate

Kept: Blue folder, spare room

D6 Passport

Kept: Bedside drawer, my side

D7 Pension statements

Kept: Grey filing box, spare room

No passwords — those belong in a password manager. Many let you name someone who can get in if needed.

CHAPTER V

Things To Be Done

What's been asked, and of whom.

For Maggie

- Tell Fairway Pensions, so Maggie's half starts
  Shared with Maggie
  About Railway pension with Fairway Pensions (P1)

For Sarah

- Ring Hartley & Webb about the will
  About Will with Hartley & Webb Solicitors (D1)
- Tell Fairway Pensions, so Maggie's half starts
  Shared with Maggie
  About Railway pension with Fairway Pensions (P1)

For Tom

- Biscuit's booster jab is due every March

CHAPTER VI

Keepsakes

Who each keepsake is for, and where it's kept.

01



Dad's pocket watch

For Tom

Kept: Top drawer of the bureau

02



The piano

For Sarah

Kept: Front room

03



Mum's recipe book

For Lily

Kept: Kitchen shelf, next to the radio