BLUE BOOK

Peace of Mind Summary

Prepared 26 September 2026



Samuel Hartley

Known as Sam · Born 12 April 1958

12 Orchard Lane, Ashby Green

PEOPLE



Maggie

Wife

07700 900123

PARTNER · NEXT OF KIN · POWER OF ATTORNEY



Sarah

Daughter

07700 900456

EXECUTOR · POWER OF ATTORNEY



Tom

Son

07700 900789



Alan Hartley

Brother

07700 900654

Ruth Webb

KEY

Solicitor

01632 960700

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.

Peace of Mind Summary — continued

KEY DOCUMENTS & BANK

WILL
With the solicitor; copy in the blue folder

LASTING POWERS OF ATTORNEY
Bureau, top drawer

BIRTH CERTIFICATE
Blue folder, spare room

MARRIAGE CERTIFICATE
Blue folder, spare room

PASSPORT
Bedside drawer, my side

PENSION STATEMENTS
Grey filing box, spare room

CAR LOGBOOK (V5C)
Kitchen drawer by the back door

HOUSE DEEDS
Grey filing box, spare room

MAIN BANK
Northgate Building Society

THOUGHTS & 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.

Confidential Details

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IDENTITY

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
MARITAL STATUS	Married

GOVERNMENT IDENTIFIERS

NATIONAL INSURANCE NUMBER	QQ123456C
PASSPORT NUMBER	123456789
DRIVING LICENCE NUMBER	HARTL504128S99AB

EXECUTOR

NAME	Sarah
PHONE	07700 900456

PARTNER · NEXT OF KIN

NAME	Maggie
DATE OF BIRTH	3 September 1960
PHONE	07700 900123

MAIN CURRENT ACCOUNT

BANK	Northgate Building Society
SORT CODE	12–34–56
ACCOUNT NUMBER	12345678

WILL

HAS A WILL	Yes
KEPT	With the solicitor; copy in the blue folder

Confidential Details — continued

POWER OF ATTORNEY

HAS ONE	Yes
COVERS	Money and property, health and care
POWER OF ATTORNEY	Maggie
PHONE	07700 900123
POWER OF ATTORNEY	Sarah
PHONE	07700 900456

HOME

HOME	Owned outright
JOINT NAMES	Yes

HEALTH

ALLERGIES	Penicillin

WISHES

FAREWELL

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

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.

Confidential Details — continued

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.