

Personal Affairs Checklist

Keep a concise record of your
personal affairs and records

What is the Personal affairs checklist?

The Personal Affairs Checklist (PAC) is a document produced by Chartered Accountants Ireland to help you keep a concise record of your personal affairs and papers. Investing a little time now to complete the PAC could save your spouse, partner, relatives or friends a great deal of time and expense in the future.

Who is the PAC for?

The PAC is for everybody. It is organised in three sections:

Section A: gives information e.g. key advisers, location of your will etc., which might be needed quickly

Section B: covers your financial affairs: banks accounts, insurance policies, other assets

Section C: covers other general information e.g. employment record, membership of clubs, etc.

The form is designed to meet many needs - you need only fill in those parts that are relevant to you.

What do I do with the completed PAC?

The completed form will contain confidential information which should not be left lying around.

We recommend that either:

- you keep the form somewhere safe, maybe in your bank or with your accountant or solicitor; or
- you give the form to someone you trust to hold (in a safe place) for you.
- Convert the form to Microsoft (MS) word and save it to a folder on your computer. You can also save the document to the cloud. However, ensure that your device is accessible and provide the password to someone you trust.

What's the difference between the PAC and my Will?

The PAC is not a Will and should not contain instructions about what should be done with your money or possessions. It is a record of where your key personal records, assets and papers can be located.

Name: _____

Civil Status: _____

Spouse's Name: _____

Address: _____

Date completed: _____

PAC to be held at: _____

Section A

My advisers are:

Accountant

Name: _____

Address: _____

Phone: _____

Email: _____

Doctor

Name: _____

Address: _____

Phone: _____

Email: _____

Solicitor

Name: _____

Address: _____

Phone: _____

Email: _____

Religious

Name: _____

Address: _____

Phone: _____

Email: _____

Undertaker

Name: _____

Address: _____

Phone: _____

Email: _____

Other Advisers

Name: _____

Address: _____

Phone: _____

Email: _____

Other Advisers

Name: _____

Address: _____

Phone: _____

Email: _____

Other Advisers

Name: _____

Address: _____

Phone: _____

Email: _____

In the event of my death or incapacity due to sudden illness please contact:

Name: _____

Address: _____

Relationship: _____

Phone: _____

Email: _____

Name: _____

Address: _____

Relationship: _____

Phone: _____

Email: _____

My will

The original of my Will is with/placed in: _____

The Will is dated: _____

The Will is drawn up by: _____

Address: _____

The Executors are: _____

Contact Details of my Solicitor: _____

Name and Address: _____

Contact Number/Email: _____

Grave Plot

Title Deeds may be found: _____

Grave plot reference number: _____

Funeral Arrangements:

Note outlining preferences may be found at the following location

Living Will' declaration to family and doctors may be found at the following location: _____

Power of Attorney for me is held by: _____

Medical Research Bequests/Donor Card may be found (eyes, kidneys, etc.): _____

My wishes regarding care of pets may be found at the following location: _____

My deed/safe box may be found at the following location: _____

The key may be found: _____

Key Number: _____

The access codes to my computer and phone are to be found in an envelope, cross-signed by me, which is held at:

Section B

Account(s) - (Banks, Building Society, Post Office, Credit Union, etc.)

I have _____ accounts.

These accounts are held at the institution(s) indicated below:

Account:

Name of Institution: _____

Address: _____

Email: _____ Phone: _____

Account No: _____

BIC/IBAN: _____

Account:

Name of Institution: _____

Address: _____

Email: _____ Phone: _____

Account No: _____

BIC/IBAN: _____

Account:

Name of Institution: _____

Address: _____

Email: _____ Phone: _____

Account No: _____

BIC/IBAN: _____

Account:

Name of Institution: _____

Address: _____

Email: _____ Phone: _____

Account No: _____

BIC/IBAN: _____

Investments
(e.g. shares, unit-trusts, premium bonds, national savings certificates, prize bonds etc.)

Type:	May be found:

Credit Cards

Type of Card:	Credit Card No:

Main Residence:

Address:

Joint Owner (Name & Address):

Phone:

Location of Deeds:

Mortgage Lender (Name & Address):

Account Number:

Other Properties:

Address:

Joint Owner (Name & Address):

Phone:

Location of Deeds:

Mortgage Lender (Name & Address):

Account Number:

Assurance/Insurance Policies e.g. Life, Car, Home, Health

Policy Type: _____

Policy Number: _____

Name & Address of Insurance Company: _____

Phone: _____

Email: _____

May be found: _____

Policy Type: _____

Policy Number: _____

Name & Address of Insurance Company: _____

Phone: _____

Email: _____

May be found: _____

Policy Type: _____

Policy Number: _____

Name & Address of Insurance Company: _____

Phone: _____

Email: _____

May be found: _____

Policy Type: _____

Policy Number: _____

Name & Address of Insurance Company: _____

Phone: _____

Email: _____

May be found: _____

Policy Type: _____

Policy Number: _____

Name & Address of Insurance Company: _____

Phone: _____

Email: _____

May be found: _____

Policy Type: _____

Policy Number: _____

Name & Address of Insurance Company: _____

Phone: _____

Email: _____

May be found: _____

Section C

Personal Information

My Birth/Marriage Certificates may be found: _____

Other documents relating to marriage may be found: _____

Details of employment

Company Name: _____

Social Welfare payment or pension (if applicable): _____

Address: _____

Employment Reference: _____

Phone: _____

Please contact: _____

I **am/am not** a member of a company pension scheme National Insurance or PPS number

Company Name Address: _____

Email: _____

Employment Reference Phone: _____

Please contact: _____

I **am/am not** a member of a company pension scheme

Directorships

Company Names:

Taxation

The tax office which deals with my affairs is: _____

Address: _____

Phone: _____ Email: _____

My Tax Reference number: _____

Associations, Clubs and Societies

(e.g. Charitable Societies, Trade Associations, Sports Clubs, Trade Union, Professional Bodies)

Association: _____	Association: _____
Address: _____ _____	Address: _____ _____
Email: _____	Email: _____
Contact: _____	Contact: _____

Jewellery/Art Work/Other assets - details may be found at the following locations:

Other Details (Not covered by any section above):

Provided by (Firm Name):

