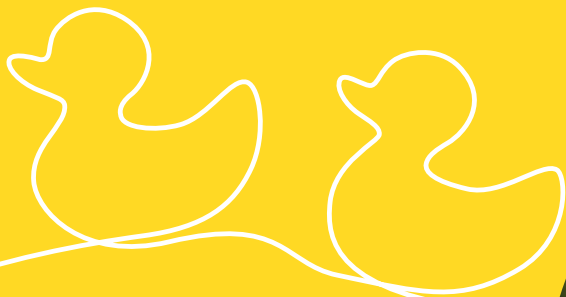


A guide to help get your **Ducks in a Row**



St Margaret's
Hospice Care



Contents

Page	Section
4	About You
10	Other Family Members
12	Close Friends
14	Pets
18	Useful Contacts
24	Finances
30	Possessions & Property
32	Key Documents
33	Digital Legacy
36	Final Wishes
41	Leaving a Gift to St Margaret's Hospice
46	About St Margaret's Hospice

About this booklet

Life can be complicated, but keeping important information together in one place can bring real peace of mind. This booklet is designed to help you record everything from where your Will and birth certificate are kept, to your key contacts, important documents, health information, and personal wishes, so that everything is safe and easy to access when it's needed.

By sharing details about yourself, the people who matter most to you, your health, and your preferences, you can help ensure that any care and support you receive is centred around you as an individual. Information such as your next of kin, medical conditions, allergies, medications, and personal preferences will help those caring for you provide safe, personalised care. It can also reassure your loved ones by helping them understand your wishes and reducing uncertainty during difficult times.

Please share as much or as little as you feel comfortable with. Every detail helps provide a better understanding of your wishes, so your care can be provided with compassion, dignity and respect.

Once you've completed this booklet, keep it in a safe place and let a trusted person know where it is. Remember to review and update it regularly so the information stays current.

SECTION 1: ABOUT YOU

Your details:

Title:

Forename(s):

Last name:

Date of birth: / /

Address:

Telephone:

Mobile:

Email:

Your spouse/partner/civil partner/next of kin:

Title:

Forename(s):

Last name:

Date of birth: / /

Address:

Telephone:

Mobile:

Email:

Medical information

Are you taking any medication?

☐ Yes / ☐ No

Do you have any medical or health conditions that might be important to note?

☐ Yes / ☐ No

Do you have any allergies?

☐ Yes / ☐ No

Do you have a pacemaker or similar?

☐ Yes / ☐ No

Have you discussed organ donation with your family? (For more information visit www.organdonation.nhs.uk)

☐ Yes / ☐ No

A little more about me

We're all individuals, and sometimes it's the little things that make us feel most comfortable and most like ourselves. Use this space to share anything about your routines, preferences, and the things you enjoy. This could help those supporting you understand what matters to you and provide care in a way that feels right for you.

My usual routine:

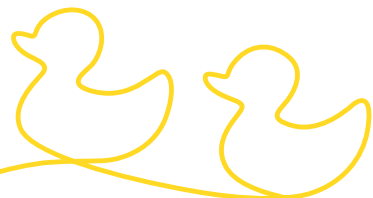
What does a typical day look like for you? Are you an early riser or a night owl? Are there particular routines that are important to you?

Food and drink:

What are your favourite foods and drinks? What do you usually like for breakfast? How do you take your tea or coffee? Is there anything you really dislike?

Music, TV and entertainment:

What music do you love? Do you have a favourite artist, radio station, TV programme, film, book, or podcast? Do you like something on in the background, or prefer quiet?



Hobbies and interests:

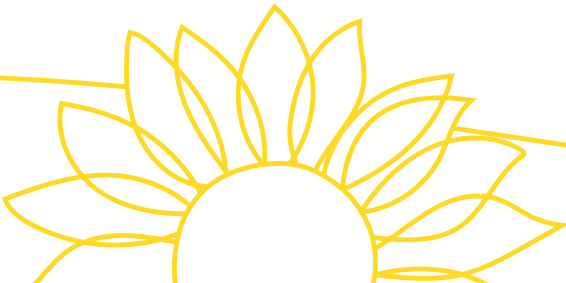
What do you enjoy doing or talking about?
This might be gardening, sport, cooking, crafts, animals, travel, music, or something completely different.

My personal preferences:

Do you prefer a bath or shower? Do you like the room warm or cool? Do you sleep with the light on or off, the door open or closed? Is there anything else that helps you feel comfortable?

The things that matter most to me:

Are there people, pets, possessions, photographs, traditions or other things that are particularly important to you?



SECTION 2: OTHER FAMILY MEMBERS

Contact 1: Relationship:

Title:

Forename(s):

Last name:

Date of birth: / /

Address:

Telephone:

Mobile:

Email:

Contact 2: Relationship:

Title:

Forename(s):

Last name:

Date of birth: / /

Address:

Telephone:

Mobile:

Email:

Contact 3: Relationship:

Title:

Forename(s):

Last name:

Date of birth: / /

Address:

Telephone:

Mobile:

Email:

Contact 4: Relationship:

Title:

Forename(s):

Last name:

Date of birth: / /

Address:

Telephone:

Mobile:

Email:

SECTION 3: CLOSE FRIENDS

Contact 1:

Title:

Forename(s):

Last name:

Date of birth: / /

Address:

Telephone:

Mobile:

Email:

Contact 2:

Title:

Forename(s):

Last name:

Date of birth: / /

Address:

Telephone:

Mobile:

Email:



SECTION 4: PETS

Pet 1:

Name:

Type/breed:

Date of birth: / / ☐ M / ☐ F

Chip number (if chipped)

Name of vet:

Telephone:

Location of vaccine record:

Insurance company:

Telephone:

Policy number

Notes:

Pet 2:

Name:

Type/breed:

Date of birth: / / ☐ M / ☐ F

Chip number (if chipped)

Name of vet:

Telephone:

Location of vaccine record:

Insurance company:

Telephone:

Policy number

Notes:

Pet 3:

Name:

Type/breed:

Date of birth: / / ☐ M / ☐ F

Chip number (if chipped)

Name of vet:

Telephone:

Location of vaccine record:

Insurance company:

Telephone:

Policy number

Notes:



A little more about my pet

If someone else needs to care for your pet, sharing a few details about their personality and routine can help them feel safe, settled and loved.

Who I would like to care for them:

Name:

Contact details:

Their usual routine:

Include things like feeding times, where they sleep and any routines they're used to.

Their favourite things:

Favourite walks, treats, toys, games, or places to sleep.

Things that make them feel happy and safe:

For example, where they like being stroked, favourite people or familiar comforts.

Things they don't like or are frightened of:

For example, other animals, loud noises, being touched in certain places or being left alone.

Anything else someone caring for them should know:

SECTION 5: USEFUL CONTACTS

This section is provided for you to include contact details for any people who are part of your life – this could be a doctor, spiritual leader, club secretary, etc. It can be helpful to have all these details in one place.

Key health contacts

(e.g. doctor, pharmacist, optician, local hospital, dentist, physiotherapist, district nurse, etc.)

Contact 1: Relationship:

Name:

Address:

Telephone:

Email:

Contact 2: Relationship:

Name:

Address:

Telephone:

Email:

Contact 3: Relationship:

Name:

Address:

Telephone:

Email:

Contact 4: Relationship:

Name:

Address:

Telephone:

Email:



Work contacts

Contact 1: Relationship:		Contact 3: Relationship:	
Name:		Name:	
Address:		Address:	
Telephone:		Telephone:	
Email:		Email:	
Contact 2: Relationship:		Contact 4: Relationship:	
Name:		Name:	
Address:		Address:	
Telephone:		Telephone:	
Email:		Email:	

Home contacts

(e.g. cleaner, home help, meals on wheels, local authority care manager)

Contact 1: Relationship:		Contact 3: Relationship:	
Name:		Name:	
Address:		Address:	
Telephone:		Telephone:	
Email:		Email:	
Contact 2: Relationship:		Contact 4: Relationship:	
Name:		Name:	
Address:		Address:	
Telephone:		Telephone:	
Email:		Email:	

Local traders

(e.g. milkman, newsagent, gardener, taxis, shops where accounts held)

Contact 1: Relationship:	Contact 3: Relationship:
Name:	Name:
Address:	Address:
Telephone:	Telephone:
Email:	Email:
Contact 2: Relationship:	Contact 4: Relationship:
Name:	Name:
Address:	Address:
Telephone:	Telephone:
Email:	Email:

Organisation contacts

(e.g. clubs, retirement association, services club, memberships, unions)

Contact 1: Relationship:	Contact 3: Relationship:
Name:	Name:
Address:	Address:
Telephone:	Telephone:
Email:	Email:
Contact 2: Relationship:	Contact 4: Relationship:
Name:	Name:
Address:	Address:
Telephone:	Telephone:
Email:	Email:

SECTION 6: FINANCES

The information in this section can help your family or trusted person easily access your financial information to manage your affairs. Please remember not to write down PIN numbers or key security information.

Financial account information

(e.g. current accounts, savings accounts, mortgage accounts, ISAs, National Savings)

Organisation 1:

Account holder name(s):

Type:

Telephone:

Chequebook or passbook

Debit card

Credit card

Organisation 2:

Account holder name(s):

Type:

Telephone:

Chequebook or passbook

Debit card

Credit card

Organisation 3:

Account holder name(s):

Type:

Telephone:

Chequebook or passbook

Debit card

Credit card

Organisation 4:

Account holder name(s):

Type:

Telephone:

Chequebook or passbook

Debit card

Credit card



Pensions, shares, Personal Equity Plans (PEP), Premium Bonds, endowment policies

Organisation 1:

Type:

Telephone:

Organisation 2:

Type:

Telephone:

Organisation 3:

Type:

Telephone:

Credit and store cards

Don't write down card numbers here.

Card Issuer 1:

Telephone:

Card Issuer 2:

Telephone:

Card Issuer 3:

Telephone:

Charity donations

Organisation 1:

Organisation 2:

Other regular payments

These could be standing orders, direct debits, membership fees etc.

Organisation 1:

Telephone:

Organisation 2:

Telephone:

Organisation 3:

Telephone:

Organisation 4:

Telephone:

Benefits claimed

Benefit 1:

Benefit 2:

Insurance policies

Home:

Organisation:

Telephone:

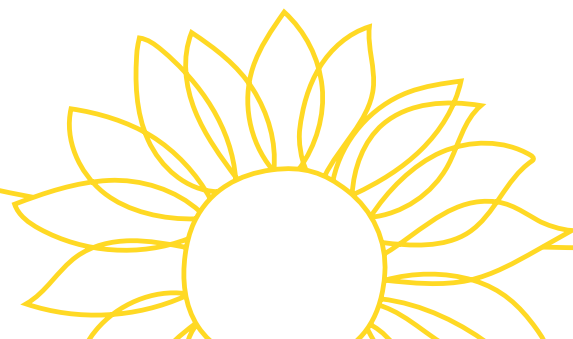
Renewal date:

Building:

Organisation:

Telephone:

Renewal date:



Insurance policies continued...

Motor:

Organisation:

Telephone:

Renewal date:

Motor breakdown:

Organisation:

Telephone:

Renewal date:

Life:

Organisation:

Telephone:

Renewal date:

Travel:

Organisation:

Telephone:

Renewal date:

Health/long-term care:

Organisation:

Telephone:

Renewal date:

Other (e.g. warranties):

Organisation:

Telephone:

Renewal date:

Utilities

Water supplier:

Account number:

Sewerage supplier:

Account number:

Gas supplier:

Account number:

Electricity supplier:

Account number:

Telephone supplier:

Account number:

Mobile phone supplier:

Account number:

Internet/broadband supplier:

Account number:

Cable/satellite TV supplier:

Account number:

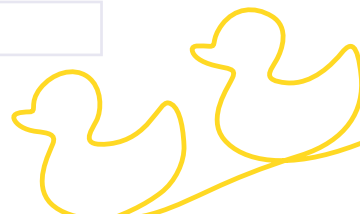
Council Tax supplier:

Account number:

Landlord/rent supplier:

Account number:

Where do you keep documents relating to your financial arrangements?



SECTION 7: POSSESSIONS & PROPERTY

Here you can note down a record of any possessions you own, and where documents relating to them are kept. These might include property, vehicles and any other significant items.

Property you own:

Property 1:

Address:

Telephone:

☐ Freehold ☐ Leasehold

If Freehold, do you have an equity release or mortgage on the property? ☐ Yes / ☐ No

Name:

Telephone:

If Leasehold, who is your landlord?

Name:

Telephone:

Property 2:

Address:

Telephone:

☐ Freehold ☐ Leasehold

If Freehold, do you have an equity release or mortgage on the property? ☐ Yes / ☐ No

Name:

Telephone:

If Leasehold, who is your landlord?

Name:

Telephone:

Vehicles

Vehicle 1:

Name of keeper:

Make and model:

Registration number:

Warranty details:

Garaging or parking permit details:

Vehicle 2:

Name of keeper:

Make and model:

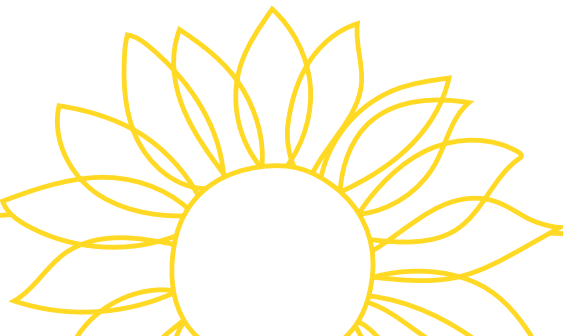
Registration number:

Warranty details:

Garaging or parking permit details:

Significant possessions

Make a note of any significant possessions, such as antiques, furniture, ceramics, glass, jewellery, rugs, paintings, watches, clocks, books. You could also include items that have sentimental value, like letters, photographs, and memorabilia.



SECTION 8: KEY DOCUMENTS

Many legal documents are gathered during a lifetime. Here, you can note down where these are stored so that they are easily accessible for those managing your affairs.

Document	Location (e.g. filing cabinet, solicitor, bank)
Birth certificate	
Marriage/civil partnership certificate	
Property deeds	
Passport	
Driving licence	
TV licence	
National Insurance card	
NHS card	
Bus pass/travel card	
Will	
Power of Attorney	
Living Will	
Other	

SECTION 9: DIGITAL LEGACY

In a world where everything is digital, one can end up with many login details for online accounts such as email and social media. Noting those down in one, easy to access place, as well as communicating what you would like to happen to those accounts when the time comes, can be really helpful for those managing your affairs.

Email

Email 1:

Email 2:

What would you like to happen to your email accounts?

☐ Delete

☐ Keep active

☐ Not sure

Social media

Platform	Username/email	What would you like to happen? <i>e.g. delete, memorialise (where possible), keep active, not sure.</i>

Financial & shopping accounts

Platform	Username/email	Notes
e.g. Amazon, PayPal		

Subscriptions & memberships

Remember, these may continue charging for their services if not cancelled.

Platform	Username/email	Notes
e.g. Netflix, Spotify, Apple		

Photos & memories

Where photos are stored	Username/email	What would you like to happen?	Notes
e.g. iCloud, Google Photos, external drive		e.g. shared with family, kept private, backed up, not sure	



SECTION 10: FINAL WISHES

This section is for you to share your final wishes. When the time comes, having this information stored and easily accessible will make things much easier for those managing your affairs.

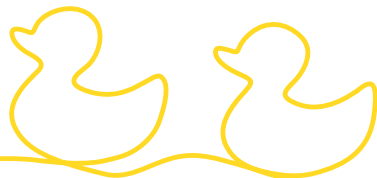
Will

Having a Will is important because it ensures that your wishes are followed when you are no longer here. Without a Will, your estate will be ‘intestate’, which means that your assets may not be managed in the way that you would like.

We have partnered with Octopus Legacy to help you write a simple Will for free. The cost of your Will is covered by us up to £150 – so if you are over the age of 18, you can write or update a simple Will for free or create a Will with a trust at a discounted rate.

If you already have a Will in place, who is/are your nominated Executor(s)?

Visit www.st-margarets-hospice.org.uk/free-will-writing/



Lasting Power of Attorney

A **Lasting Power of Attorney (LPA)** allows you to appoint one or more trusted people to make decisions on your behalf if you become unable to make those decisions yourself.

There are two types of LPA:

- **Health and Welfare** – covers decisions about your health, care and wellbeing.
- **Property and Financial Affairs** – covers decisions about your money, property and other financial matters.

Living Wills, Advance Decisions, Advance Statements and Advance Directives are documents that allow you to record your wishes and preferences for the future. They can help ensure that your wishes are known if you become unable to make or communicate decisions for yourself.

Medical science

Have you arranged for your body to be donated to medical science? ☐ Yes / ☐ No

If yes:

Name:

Telephone:

Leaving a message

Some people decide to leave a message for their loved ones. Whether this message covers topics that hadn’t been discussed previously, information you want to share, or just telling loved ones how much they meant to you, leaving a letter or recording a film on your mobile phone can be something people treasure forever. If you decide to leave a message, you can note down where this message can be found below.

Funeral wishes

Many people find it difficult to think about making arrangements for their funeral. But it may be helpful to think about what type of funeral you would like, where you would like it to be, who you would like to attend, and any readings or music you'd like. You can use this section to note down your wishes to help loved ones make plans when the time comes.

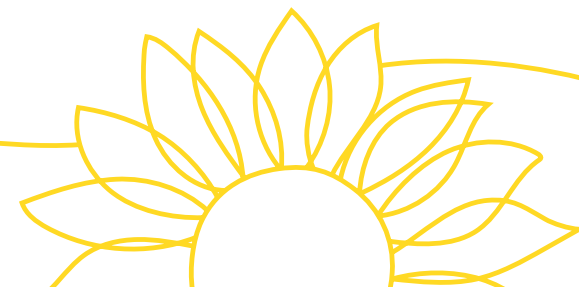
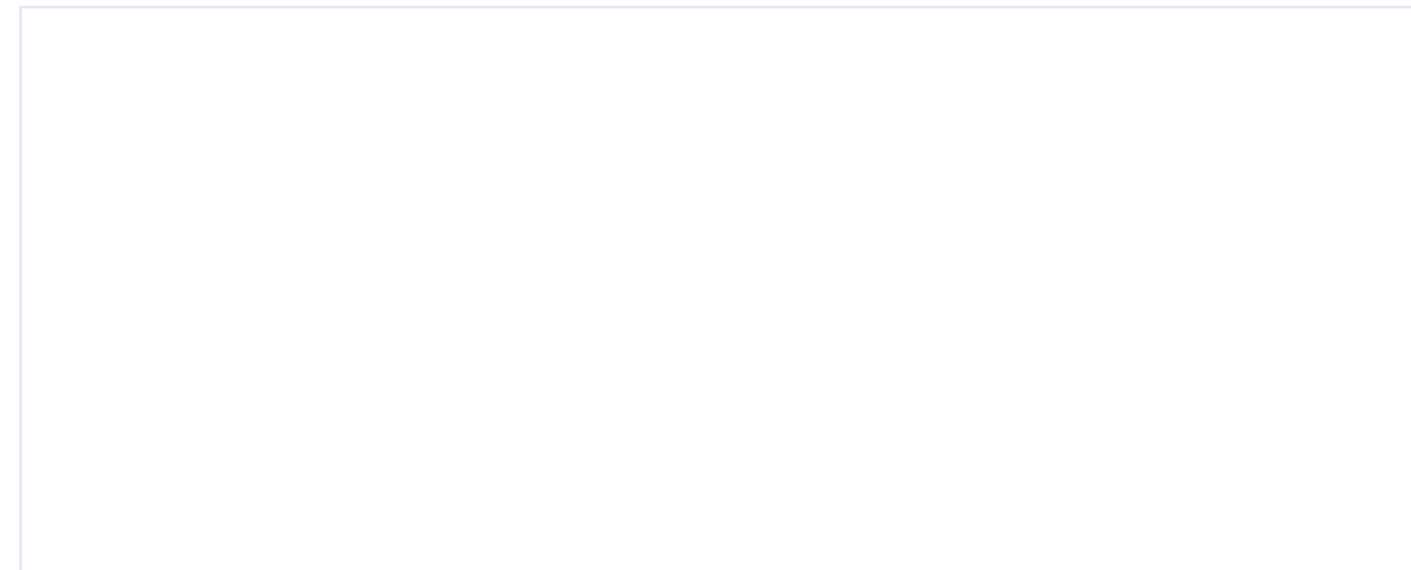
When writing notes, you might want to consider the following:

- Do you have a funeral plan and if so, where is it? (note: Wills are not always read before a funeral)
- If you'd like to be buried, have you arranged for a burial plot? And what sort of coffin would you like? (e.g. wicker, traditional, cardboard)
- Would you like your body to be embalmed?
- What would you like to be dressed in?

- Where would you like your body to rest? (e.g. at the funeral home, at home, at church)
- If cremated, where would you like this to happen and what would you like to happen to your ashes?
- Would you like a funeral service? If yes, where would you like it to be held?
- Is there someone that you'd like a service to be led by?
- Are there particular songs/readings/prayers that you'd like as part of the service?
- What religion/spiritual beliefs/philosophies do you follow?
- Do you have a preferred funeral director?
- Would you like flowers at your funeral?
- Would you like donations and if so, to which charity?
- Would you like your death to be announced in the press – if so, which publications?

- Are there particular family members or friends you'd like to take part in the funeral?
- Would you like a memorial stone and if so, what should it say?

- Have you made financial provisions for funeral arrangements?

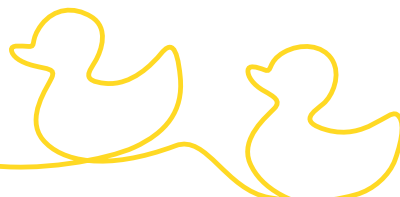


Funeral Donations

Funeral donations are a particularly meaningful way to remember your loved one while supporting St Margaret's. For family and friends, making a donation to charity at a funeral can be a way of paying tribute to someone very special while saying thank you to a charity that offered support during a difficult time or was particularly close to their heart.

If you choose to support St Margaret's at this time, you can rest assured that these gifts will help us to continue providing our vital hospice care for patients and families all over Somerset.

If you have any questions about arranging a funeral collection for your loved one, please contact our Supporter Care team. They can be contacted via email supportercare@st-margarets-hospice.org.uk or on 01935 709485.



Keep this somewhere safe

Once completed, this booklet will contain sensitive information that you may only want those closest to you to know. Keep it somewhere safe, but make sure a trusted person knows where it is so it can be easily accessed when needed.

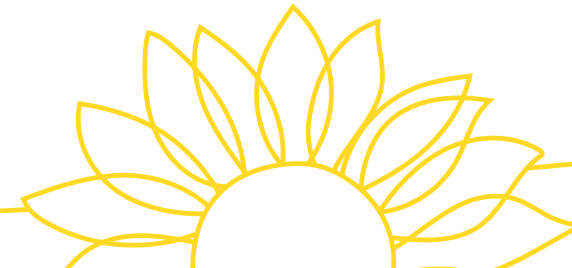
Leaving a gift to St Margaret's Hospice

Each year we help over 4,800 people across Somerset and we're determined to be there for anyone who needs us in the future – but we can't do this on our own. The cost of providing our specialist care increases every year; in 2025/6 it cost over £17m to deliver our services. Today, 1 in 3 of our patients are cared for thanks to gifts left in Wills. Should you choose to remember St Margaret's in your Will, your gift, however big or small, will help to ensure we are here for our community when it matters most, protecting hospice care, now and always.

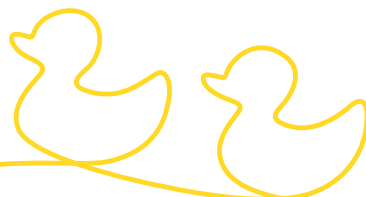


Additional Notes

Use these pages to note down any additional information or notes that you think might be helpful.



Additional Notes



About St Margaret's Hospice

St Margaret's has provided expert end-of-life and palliative care for patients and families in Somerset for over four decades.

As we continue to deliver free, holistic, compassionate hospice care, our aim is to empower more people with progressive life-limiting illnesses to live fully and die with dignity.

Hospice care at St Margaret's is about taking the time to care – getting to know our patients, listening and tailoring a personalised approach. This means combining excellent medical and nursing care with integrated support that recognises people's practical, emotional, social, and spiritual needs. Our values of compassion, collaboration and ambition reflect this and underpin all that we do, weaving through every aspect of our care and service provision.

Our services are free to anyone, regardless of their background, faith, culture, personal identity, or location within the county. We firmly believe that compassionate care should be accessible to all, and we strive to ensure that our support reaches every individual who can benefit from it. We recognise that this also means looking after those closest to our patients - their husbands, wives, life partners, children, and carers, both before, during and after death.



St Margaret's Hospice Care

Taunton Hospice Hub

Heron Drive

Taunton

TA1 5HA

01823 333822

Yeovil Hospice Hub

Little Tarrat Lane

Yeovil

BA20 2HU

01935 709480



**St Margaret's
Hospice Care**

Registered Charity No: 279473
Company Registration No: 01471345



Registered with
**FUNDRAISING
REGULATOR**