



Planning Ahead

Helping get your affairs in order

About us

Pilgrims helps people facing life-limiting illness, and their families, to live well in every moment.

Our work began 40 years ago, with the vision of one village nurse – our late President Ann Robertson. Ann wanted to make a difference for the people in her community facing terminal illness.

Thanks to her devotion, and the help of countless others, today we have over 200 Pilgrims nurses and therapists. Together they support thousands of people in east Kent each year, providing compassionate care to every family, every time.



Our Vision

At Pilgrims Hospices we have a simple vision: A community where people with a life limiting illness and their family and friends are supported and empowered to live well in mind and body until the very last moment of their life.

Our Mission

Our mission is to make a difference in the lives of individuals in east Kent who are facing the last year of life. To do this, we:

- ✓ Provide open, compassionate care and expertise for patients and their families; both in the community and in our in-patient units. We will continue this support for families through their bereavement.
- ✓ Inform, educate and enable patients and their families so they can make informed choices and participate in planning their own care.
- ✓ Form strategic partnerships throughout our community; sharing our research, knowledge and expertise to enable others to play their part in supporting families where and when they need it.

In 2023/2024 it cost over £15 million to run our services, all provided free of charge to the people of east Kent. Approximately 25% of our funding comes from the government. The remaining funds come from the amazing generosity of our local community through donations, fundraising events, our shops, hospice lottery, corporates and trusts, and gifts in Wills.

Helping you get your affairs in order

Paperwork and digital records can be stored in all sorts of places and are sometimes not written down. We all know only too well that keeping the information together and accessible can easily fall by the wayside.

At Pilgrims Hospices, we know how difficult it can be when important details or documents cannot be located. Our best advice is to be prepared, which is why we have created this handy guide to keep all your important details in one safe and accessible place.

Getting your affairs in order will enable you to record and quickly find important information about your life, without having to sort through masses of paperwork. This booklet offers a place to record where you keep your will, which energy supplier you use, all the papers relating to your insurance and where all your key documents such as birth and marriage certificates are located.

This booklet will guide you through the process of recording your affairs, allowing you to collect information about your life in one safe and accessible place. This is your own personal book, to use as you like and in whichever way will be most helpful to you.

Don't forget

Store this document in a safe and secure place

After you have filled it in, it is important that you store it in a safe, secure place so that you can use it to its full potential, updating it as information changes over time.

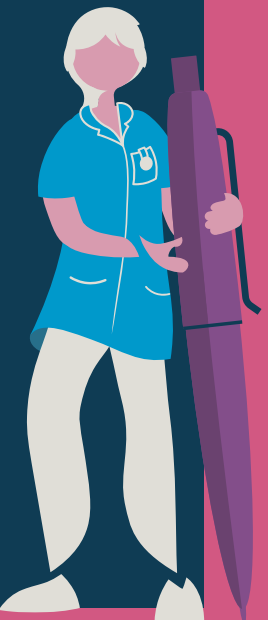
Pilgrims understands the value of planning for a time you may be less well and unable to speak for yourself. If you would like to come along to one of our 'Think' sessions please call 01227 538872 and ask to be booked in.



Canterbury
56 London Road,
Canterbury,
Kent CT2 8JA

Ashford
Hythe Road, Willesborough,
Ashford, Kent TN24 0NE

Thanet
Ramsgate Road, Margate,
Kent CT9 4AD



How to use this booklet

Your information

This allows you to record details of yourself and those dearest to you, including friends and family, and even your pets.

Your contacts

Through your life, you will have made many connections outside of your closest circle of friends. This section allows you to record useful details of such people, those you have worked with or currently work with, medical contacts and utilities.

Your documents

Over the years, you will have amassed important paperwork, including your insurance details and will. Here you can note the whereabouts of these vital documents.

Your possessions and property

Here you can record details of things you own which are important in value or sentiment.

If you need someone to work through this guide with you, we can help.

Phone: 01233 504 133

 @PilgrimsHospice

Important information about this document

It's essential to keep legal or health documents relating to important aspects of your life, and often they're lodged with many people or organisations in multiple locations, especially in this digital age we live in. Although this variety of paperwork may seem daunting to organise, Planning Ahead helpfully splits these things up into several sections to keep them all for the future.

This guide is written with many different people in mind – we have tried to make a guide that everyone can use.

The booklet will allow you to keep a record of a busy life from the calm of your home. Don't feel rushed to complete it – fill it in your own time, keep it safe, and update it as necessary.

If you become unable to manage your affairs independently, it is vital that someone you trust knows where to find your Planning Ahead guide, so that they can help to look after everything that is important to you.

Most people have a location where they keep information that is useful in case of emergencies; this could be a suitable place to record information about where your Planning Ahead guide is stored.

Lastly, it is important for your safety and security that you make sure not to record any key security information in this book, such as PIN numbers and bank account numbers. These pieces of information are confidential, and it is vital that they do not fall into the wrong hands.

Your information

This section contains space for you to enter information about your immediate family, closest friends and your pets and animals. It may be useful to confirm with your friends that the details you fill in are correct, so that they can be contacted when you need them.

Your details

Title _____

Forename{s) _____

Last name _____

Date of birth _____

Address _____

Postcode _____

Country _____

Telephone _____

Mobile _____

Email _____

Do you carry a donor card?

☐ Yes ☐ No

If yes, where is it kept?

Your partner or next of kin

Title _____

Forename{s) _____

Last name _____

Date of birth _____

Address _____

Postcode _____

Country _____

Telephone _____

Mobile _____

Email _____

Don't forget

If any of your details change, ensure to update this document

Your children, parents, dependants or other close family contact

Contact 1, My _____

Title _____

Forename(s) _____

Last name _____

Date of birth _____

Address _____

Country _____

Telephone _____

Mobile _____

Email _____

Contact 2, My _____

Title _____

Forename(s) _____

Last name _____

Date of birth _____

Address _____

Country _____

Telephone _____

Mobile _____

Email _____

Contact 3, My _____

Title _____

Forename(s) _____

Last name _____

Date of birth _____

Address _____

Country _____

Telephone _____

Mobile _____

Email _____

Contact 4, My _____

Title _____

Forename(s) _____

Last name _____

Date of birth _____

Address _____

Country _____

Telephone _____

Mobile _____

Email _____

Your close friends

Friend 1

Title _____

Forename(s) _____

Last name _____

Date of birth _____

Address _____

Country _____

Telephone _____

Mobile _____

Email _____

Friend 2

Title _____

Forename(s) _____

Last name _____

Date of birth _____

Address _____

Country _____

Telephone _____

Mobile _____

Email _____

Mobile _____

Email _____

Your pets

Pet 1

Name _____

D.O.B _____

Male/female _____

Type/breed _____

Chip number_____

Special needs _____

Name of vet _____

Vet telephone _____

Location of vaccine records

Insurance company _____

Policy No. _____

Telephone_____

Your wishes incase of emergency

Pet 2

Name _____

D.O.B _____

Male/female _____

Type/breed _____

Chip number_____

Special needs _____

Name of vet _____

Vet telephone _____

Location of vaccine records

Insurance company _____

Policy No. _____

Telephone_____

Your wishes incase of emergency

Your medical or health conditions that might be important for people to know

Are you taking any medicines?

☐ Yes ☐ No

If yes, complete the table below

Name _____

Reason for taking _____

Where it is kept _____

Name _____

Reason for taking _____

Where it is kept _____

Name _____

Reason for taking _____

Where it is kept _____

Name _____

Reason for taking _____

Where it is kept _____

Details of any illness or drug therapy that might affect emergency treatment:

Do you suffer from allergies or any allergic reaction to medication?

☐ Yes ☐ No

If yes, please list them here: _____

Do you have a pacemaker or similar appliance fitted?

☐ Yes ☐ No

If yes, please list details here: _____

Your contacts

You probably have a great many contacts who form part of your life. These may include people like your doctor, your spiritual leader, or a club secretary. It can be extremely helpful to have details of all these people recorded in one place.

As well as individuals, there'll be a range of contacts (e.g. local shops and services) you could record here. Also, if you are employed, or undertake voluntary work, these might be as useful to record as your membership of clubs and organisations that are important to you.

There is also a section for you to list numbers for the local police or emergency numbers for your utilities. We hope having these compiled in one place will be useful to you.



Key health contacts

e.g. doctor, pharmacist, optician, local hospital, dentist, district nurse.

Contact 1, My _____

Name _____

Address _____

Telephone _____

Contact 2, My _____

Name _____

Address _____

Telephone _____

Contact 3, My _____

Name _____

Address _____

Telephone _____

Contact 4, My _____

Name _____

Address _____

Telephone _____

Work contacts

e.g. colleague, business partner, employer, main or voluntary work contact

Contact 1, My _____

Name _____

Address _____

Telephone _____

Contact 2, My _____

Name _____

Address _____

Telephone _____

Home contacts

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

Contact 1, My _____

Name _____

Address _____

Telephone _____

Contact 2, My _____

Name _____

Address _____

Telephone _____

Local traders

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

Contact 1, My _____

Name _____

Address _____

Telephone _____

Contact 2, My _____

Name _____

Address _____

Telephone _____

Organisation contacts

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

Contact 1, My _____

Name _____

Address _____

Telephone _____

Contact 2, My _____

Name _____

Address _____

Telephone _____



Others

e.g. accountant, solicitor, spiritual leader

Contact 1, My _____

Name _____

Address _____

Telephone _____

Contact 2, My _____

Name _____

Address _____

Telephone _____

Contact 3, My _____

Name _____

Address _____

Telephone _____

Contact 4, My _____

Name _____

Address _____

Telephone _____

Useful telephone numbers

Local police (non-emergency) _____

Doctor (out of hours) _____

Water (emergency) _____

Sewage (emergency) _____

Gas national (emergency) **0800 111999** _____

Electricity (emergency) _____

Pilgrims Hospice **01233 504133** _____

Local authority _____

Citizens Advice Bureau _____

Library _____

Your documents

As you go through life, you collect many legal documents, such as birth, marriage or civil partnership certificates, deeds and a will. In this section, you can record the existence and whereabouts of these documents.

Knowing where these can be found is essential for your family or executor in the future if they need to manage your affairs.



Document location*

Birth certificate _____

Marriage/civil partnership certificate _____

Deeds to your property _____

Passport _____

Driving licence _____

Television licence _____

National Insurance card _____

NHS card _____

Bus pass or travel car _____

Other _____

* e.g. Filing drawer, solicitor, bank

Funeral plan

Company name _____

Telephone _____

Where documents are kept _____

Life insurance

Company name _____

Telephone _____

Where documents are kept _____

Writing a will

Writing a will allows you to decide what happens to your assets and possessions when you die and is a crucial document for those left behind, which can save distress and unnecessary legal expenses.

A Lasting Power of Attorney (LPA)

Allows you to appoint a trusted person(s) living will to act on your behalf if you are unable to make certain decisions yourself. There are two different types of LPA – Health & Welfare and Property & Financial Affairs.

Living wills, advance decisions, advance statements, or advance directives.

In Kent and Medway, your future wishes to refuse treatment are recorded as a reSPECT

form, and can be completed with a health care professional.

A will is an important document that ensures those you care about are provided for after your death.

Writing a will allows you to decide what happens to your assets and possessions when you die. Without a valid will, a person's estate is said to be 'intestate' and can mean that the specific wishes you may have for your family or loved ones may not be carried out.

We recommend that you use an experienced solicitor to draft your will or make amendments to an existing will.

If you have any of these documents it is advisable to make sure they are kept up to date and that relevant people know about them, so they can be used if needed.

Location	Executor(s)*
Will _____	_____
Power of Attorney _____	_____
_____	_____
Living Will _____	_____
_____	_____

*Executor(s)/attorney/nominated person as named in the appropriate document.

What about Inheritance Tax?

If your estate is over a certain value your beneficiaries will need to pay Inheritance Tax: 40% will be taken from the portion of your estate that is over the threshold.

Gifts to charities are exempt from Inheritance Tax and the value of your estate is calculated after the value of gifts like these are deducted.

For more information, please visit gov.uk/inheritance-tax

Gifts to charities

We know your first priority when making your Will is to provide for your loved ones. Many people find that after they've done this they would like to leave a gift to charity.

After you've taken care of your loved ones, leaving a little of what is left to Pilgrims Hospices will help secure the future of local hospice care – just 1% of your estate can make a huge difference.

By leaving a gift in your Will, you will be helping our chefs prepare a patient's favourite meal, create lasting memories with creative Therapy Centre sessions, and make someone's final moments as comfortable as possible.



Make a Will Month

Each April, solicitors across east Kent kindly donate their time and expertise to write, or update Wills, in exchange for an upfront donation to the hospice.

To find out more, and register your interest, visit pilgrimshospices.org/makeawill

Get in Touch

We're always here to help. You can speak to our friendly Gifts in Wills Team by calling **01227 782060** or email giftsinwills@pilgrimshospices.org

Your possessions and property

Everybody has possessions and it can be extremely useful to maintain a record of what they are, where they are located and where key documents relating to them are kept. This booklet is the ideal place for noting this down. This might include information about property, vehicles and significant possessions.



Property that you own

Address (if different to the details given earlier)

Postcode

Country

Telephone

Are you the freehold owner or leaseholder?

☐ Yes

☐ No

If freehold owner, do you have an equity release or mortgage on the property?

☐ Yes

☐ No

If so, provide details

If leaseholder, who is your landlord?

Name

Telephone

Do you have a tenant?

☐ Yes

☐ No

Tenant Telephone

Vehicles

Here you can record details of cars, motorcycles, caravans, mobility scooters, etc.

Vehicle 1

Name of keeper of vehicle

Make and model

Registration number

Location of documents relating to the vehicle

Where serviced

Warranty details

Garaging or parking permit details

Vehicle 2

Name of keeper of vehicle

Make and model

Registration number

Location of documents relating to the vehicle

Where serviced

Warranty details

Garaging or parking permit details

Significant possessions

It may be worthwhile noting your significant possessions here.

This often brings peace of mind, because if someone else must manage your affairs, they may not be fully informed and important items could be lost.

Significant possessions might include antiques, furniture, ceramics, glass, jewellery, rugs, paintings, watches, clocks, books.

Items of sentimental value might include letters/cards, photographs, photograph albums, costume jewellery, items from your childhood or from your children and family memorabilia.

Your finances

This is where you can put all your financial information together in one place. It will allow you to keep track of your different financial arrangements and help your family or trusted person to look after your affairs should the need arise.

Here you can list the various financial accounts you have.
e.g. current accounts, savings accounts, mortgage accounts, ISAs, or National Savings

Please remember

Don't record card numbers, PIN numbers or key security information of any sort.

Organisation 1

Name(s) in which account held

Type

Telephone

Cheque book or Passbook ☐ Yes ☐ No

Debit card ☐ Yes ☐ No

Organisation 2

Name(s) in which account held

Type

Telephone

Cheque book or Passbook ☐ Yes ☐ No

Debit card ☐ Yes ☐ No

Organisation 3

Name(s) in which account held

Type

Telephone

Cheque book or Passbook ☐ Yes ☐ No

Debit card ☐ Yes ☐ No

Organisation 4

Name(s) in which account held

Type

Telephone

Cheque book or Passbook ☐ Yes ☐ No

Debit card ☐ Yes ☐ No

You may have pensions

e.g. state or work, shares, PEPs,
Premium Bonds or endowment policies.

You can record who they are with here.

Organisation 1 _____

Type _____

Telephone _____

Organisation 2 _____

Type _____

Telephone _____

Organisation 3 _____

Type _____

Telephone _____

Credit and store cards

Do not list card numbers

Issuer	Telephone
--------	-----------

Card 1	_____
--------	-------

Card 2	_____
--------	-------

Card 3	_____
--------	-------

Notes of other of other regular payments

Organisation	Telephone
--------------	-----------

1	_____
---	-------

2	_____
---	-------

3	_____
---	-------

4	_____
---	-------

Where do you keep documents
relating to all these affairs?



Utility, key suppliers and accounts

Water Supplier _____

Account No. _____

Sewerage Supplier _____

Account No. _____

Gas Supplier _____

Account No. _____

Electricity Supplier _____

Account No. _____

Telephone Supplier _____

Account No. _____

Mobile phone Supplier _____

Account No. _____

Broadband Supplier _____

Account No. _____

Cable/satellite TV Supplier _____

Account No. _____

Council Tax Supplier _____

Account No. _____

Landlord/rent _____

HM Revenue and Customs Office

Location _____

Telephone _____

State benefit contact

Location _____

Telephone _____

Benefits claimed _____

Insurance policies

Home contents

Policy No. _____

Telephone _____

Document location _____

Renewal date _____

Building

Policy No. _____

Telephone _____

Document location _____

Renewal date _____

Motor

Policy No. _____

Telephone _____

Document location _____

Renewal date _____

Motor breakdown

Policy No. _____

Telephone _____

Document location _____

Renewal date _____

Life

Policy No. _____

Telephone _____

Document location _____

Renewal date _____

Travel

Policy No. _____

Telephone _____

Document location _____

Renewal date _____

Health/long term care

Telephone _____

Document location _____

Renewal date _____

Other

e.g. warranties

Telephone _____

Document location _____

Renewal date _____

Your final wishes

This section is the ideal place for you to include your thoughts and wishes for the time when others will have to administer your affairs.

It will undoubtedly be a difficult time for your loved ones but made so much easier if they know what your preferences are.

Your funeral wishes

It may be helpful to consider what type of funeral you would like, where you would like it to be held, who you would like to be there, any readings and poems you'd like to be read (and by whom) and any music you'd like to be played.

Above all, this section is the perfect opportunity to let loved ones know your wishes.

First choose and note which statement below applies to you

- ☐ I am describing my funeral wishes in this booklet (overleaf).
- ☐ I have already thought about my funeral arrangements (below).

They are stored (give location)

e.g. held in my funeral plan or written in my will (note that wills are not always read before the funeral).



Service

Would you like a Funeral Service?

☐ Yes ☐ No

A ‘direct cremation’ (no service)?

☐ Yes ☐ No

OR a brief committal at the graveside or crematorium?

☐ Yes ☐ No

If yes, in which religion I spiritual belief/ philosophy?

If yes, where would you like it to be held?

I would like my Funeral to be conducted by:

Name

Telephone

Music

e.g. instrumental, songs sung or played

Readings

e.g. poem, eulogy, religious words

Other special requests

Do you have a strong preference which funeral director is used?

☐ Yes ☐ No

If so, please supply contact details

Name

Telephone

I would want to be

☐ Buried ☐ Cremated

I would like my coffin to be

☐ Traditional (wood)

☐ Modern (e.g. wicker/ cardboard/ decorated)

I would like my body to rest

e.g. at the funeral home, at home or at the church the night before the service.

Burial

☐ I have arranged for a burial plot

☐ I have not arranged for a burial plot

If you have, please give details, e.g. existing plot/pre-purchased plot, who owns the plot and where the documents are kept.

If not, where would you like to be buried?

Please give details. e.g. religious location/ cemetery/woodland or green site/other?

Embalming

☐ I would prefer my body to be embalmed if possible

☐ I would not prefer my body to be embalmed if possible.

I would prefer my body to be dressed in

Cremation

☐ I do not mind where I am cremated

☐ I would prefer to be cremated at

I would like my ashes to be

☐ Scattered ☐ Buried ☐ Interred ☐ Kept

Please indicate where, e.g. a special place, crematorium burial plot, religious location, family grave, crematorium garden of remembrance, an urn or I would like to allow my family to decide.

Medical science

If you have arranged to donate your body to medical science, please note here who needs to be notified of your death to make the necessary arrangements:

Name

Telephone

My preferred route is

☐ I do not have a preference about what route is taken to the service/crematorium/cemetery.

☐ I do have a preference about what route is taken to the service/crematorium/cemetery.

Please give details below

Announcement

- ☐ I would like the announcement of my death to be made in Local press/National press
- ☐ I would wish the notice to go into the following publications.

Name of newspaper(s)

Family and friends

I would like the following I family members and friends to be asked if they would take part in the funeral:
e.g. as a coffin bearer or a reader

Name

Telephone

What I'd like them to do

Name

Telephone

What I'd like them to do

Flowers or donations

- ☐ I would like flowers at my funeral.
- ☐ I would not like flowers at my funeral.

If yes, do you have a preference on what type?

I would prefer donations to go to the following charities

Name of charities

Special request

I wish for my pet(s) to be cared for after my death in the following manner

Memorial

I would like a memorial stone of the following type and with the following words.

I would prefer another type of commemoration
e.g. bench, tree planted, donation to a charity.

Other wishes

e.g. requests, cultural or religious requirements and customs

- ☐ I have
- ☐ I have not

made some financial provision for these arrangements and wishes. If you have, give details

Leaving a message

You might want to consider leaving a message to your loved ones. Many of us leave things unsaid with those we care about the most and so often people say, 'I wish I'd asked them ...', 'I wish we'd talked about...' or 'I wish I'd told them...'

There may well be topics you've never discussed or information that you might want to pass on to your loved ones and talking to them Face to face could be difficult or might not be the best way for you to handle it. Instead, writing a letter could be the simplest solution. It might well include information about your family, or it could just be the perfect occasion to tell them how much they have meant to you.

After the funeral

I would want my friends and family to come together and



The Blackbird Project

Capturing the distinct voice of those we love forever

In this digital age, it's easy to believe there's always a recording, somewhere, of our loved ones, but many of us may not think to leave behind a specific message. We give our patients their voice and enable them to leave a vocal memory for their family and friends. The recording is stored on a Blackbird USB stick and given to the patient, or loved one they have nominated, for them to treasure forever. For more information, please contact us on **01233 504 133**.

My message is to be found

We can help you prepare for the
end of life. How to talk about it,
plan for it, and record your wishes.



Have any questions? Talk to us

Phone: 01233 504 133 **Email:** eastkent@pilgrimshospices.org

Visit: www.pilgrimshospices.org  [pilgrimshospices](https://www.facebook.com/pilgrimshospices)  [@PilgrimsHospice](https://twitter.com/PilgrimsHospice)

Ashford

Hythe Road, Willesborough,
Ashford, Kent TN24 0NE

Canterbury

56 London Road, Canterbury,
Kent CT2 8JA

Thanet

Ramsgate Road, Margate,
Kent CT9 4AD

Pilgrims Hospices in East Kent is a company limited by guarantee. Registered charity number: 293968.
Registered company number: 2000560. Registered office: 56 London Road, Canterbury, Kent CT2 8JA

