

Personal information

Employer/former employer if in receipt of a company pension

Company: _____

Contact: _____

Address: _____

Postcode: _____ Tel: _____

(If you are in receipt of multiple pensions, add additional company details on a blank page)

Inform the Department for Work and Pensions: Tell us once 0800 085 7308

I have been receiving (delete or add as appropriate):

State pension/pension credit/
attendance allowance/other state benefits _____

Reference number: _____

Inform Her Majesty's Revenue and Customs (HMRC)

Address: _____

_____ Tel: _____

Tax reference: _____

Where to find other important documents/items

Birth/marriage certificate/divorce papers: _____

Passport: _____

Driving licence & vehicle log book: _____

Insurance policies: _____

Stocks and shares certificates: _____

Property deeds/lease: _____

National savings bonds/certificates: _____

Premium bond certificates: _____

Private pension/state pension/benefits documents: _____

Bank statements/mortgage documents: _____

Hire purchase agreements: _____

Income tax data: _____

Additional information

Bank/building society details

Name: _____

Address: _____

Postcode: _____ Tel: _____

Current account no(s): _____

Savings account no(s): _____

Items in safety deposit: _____

Credit/debit/store cards

Name of card: _____ Card no. _____

Name of card: _____ Card no. _____

Name of card: _____ Card no. _____

Cancel direct debits to the following charities/subscription services:

Name of organisation: _____ Amount: _____

Name of organisation: _____ Amount: _____

Name of organisation: _____ Amount: _____

Claims to be made under the following investment/insurance policies

List companies, addresses, policy numbers:

Inform the following where applicable

Electricity supplier

Name: _____ Account/ref no: _____

Address: _____

_____ Postcode: _____

Gas supplier

Name: _____ Account/ref no: _____

Address: _____

_____ Postcode: _____

Home telephone supplier

Name: _____ Account/ref no: _____

Address: _____

_____ Postcode: _____

Additional information

Mobile telephone supplier

Name: _____ Account/ref no: _____

Address: _____

_____ Postcode: _____

Water supplier

Name: _____ Account/ref no: _____

Address: _____

_____ Postcode: _____

Council tax/Council property rent department

Name of Council: _____

Address: _____

_____ Postcode: _____

Broadband supplier

Name: _____ Account/ref no: _____

Address: _____

_____ Postcode: _____

Other services/suppliers to contact TV licence/digital TV subscriptions/financial adviser/ accountant

Clubs/gym/professional associations to be informed

Names, addresses, email addresses, telephone numbers

Digital accounts (social media/Paypal/Amazon etc)

Website	User ID	Password	Memorable information
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