

Your Magenta Manual

The easy way to store all your important
information, life details and future wishes

Magenta
FINANCIAL PLANNING



This **Magenta Manual** has been designed to help you keep all your important information in one place.

Your **Magenta Manual** will help you and your family to keep a record of virtually every aspect of your life, so that if you cannot deal with things yourself, someone else can take over and help you out.

The creation of this document has been inspired by many of our clients who have lost partners and subsequently found it difficult to resume normal life because they did not know how their partner had organised their joint life. It is also very useful for adult children left to deal with the estates of deceased parents, family or friends.

In fact we think everyone should have a **Magenta Manual**.

You should complete your **Magenta Manual** at your own pace and as accurately as possible. It is really important to keep it up to date (record the most recent date of any changes) and tell someone you trust, where to find it.

We suggest that you keep your precious and important documents like your Wills, Powers of Attorney, letter of wishes etc together with this manual all in one place.

Personal Details

	You	Your Spouse/partner, next of kin
Your full name		
Date of birth		
NI number		
Address		
Home Tel		
Mobile		
Email		

Where do you keep the property deeds to your main home?

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Your children, parents, dependents or other close family

Relationship to you		Relationship to you	
Their full name		Their full name	
Date of birth		Date of birth	
Address		Address	
Home Tel		Home Tel	
Mobile		Mobile	
Email		Email	

Relationship to you		Relationship to you	
Their full name		Their full name	
Date of birth		Date of birth	
Address		Address	
Home Tel		Home Tel	
Mobile		Mobile	
Email		Email	

Your pets

Name		Name	
Type/breed		Type/breed	
Birth date		Birth date	
Male/female		Male/female	
Chip number		Chip number	
Special needs		Special needs	

Name		Name	
Type/breed		Type/breed	
Birth date		Birth date	
Male/female		Male/female	
Chip number		Chip number	
Special needs		Special needs	

Name of vet		Tel no	
Location of vaccination record (s)			
Insurance company			
Tel no		Policy no	
Your wishes in case of emergency			

Detail your wishes for your pet(s), in the event of illness or death.	Name and contact details:
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Your close friends

Friend's full name		
Address		
Home Tel		
Mobile		
Email		

Where do you keep your address book/contacts list?	
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Medical information and health conditions

	You	Your Spouse/partner
Details of any medical conditions that might affect emergency treatment		
Details of any medication		
Any allergies or allergic reactions to medication?		
Where do you keep your medication?		
Do you have a pacemaker or similar appliance?		
Do you carry an organ donor card? If so, where is it kept?		
Blood group		
GP Name & Address		
GP contact number		
Other medical professionals that are important e.g Physiotherapist, Macmillan Nurse		
Type		
Contact Number(s)		

Important life contacts

Use this section to detail information about your optician, dentist, pharmacist, district nurse etc

Contact type		Contact type	
Name and address		Name and address	
Tel number and/or email		Tel number and/or email	
Contact type		Contact type	
Name and address		Name and address	
Tel number and/or email		Tel number and/or email	

Work contacts - eg: boss, manager, colleague, HR dept, business partner etc

Contact type		Contact type	
Name and address		Name and address	
Tel number and/or email		Tel number and/or email	



Home contacts – eg: cleaner, gardener, decorator, home help, carer, neighbours etc

Contact type		Contact type	
Name and address		Name and address	
Tel number and/or email		Tel number and/or email	
Contact type		Contact type	
Name and address		Name and address	
Tel number and/or email		Tel number and/or email	

Local traders – eg: milkman, newsagent, taxi firm, handyman, builder, plumber etc

Contact type		Contact type	
Name and address		Name and address	
Tel number and/or email		Tel number and/or email	
Contact type		Contact type	
Name and address		Name and address	
Tel number and/or email		Tel number and/or email	

Organisation contacts – eg: clubs, membership groups, social, library etc

Contact type		Contact type	
Name and address		Name and address	
Tel number and/or email		Tel number and/or email	
Contact type		Contact type	
Name and address		Name and address	
Tel number and/or email		Tel number and/or email	

Other contacts – eg: financial planner, accountant, solicitor, spiritual leader etc

Contact type		Contact type	
Name and address		Name and address	
Tel number and/or email		Tel number and/or email	
Contact type		Contact type	
Name and address		Name and address	
Tel number and/or email		Tel number and/or email	

Utility contacts – eg: electricity, gas and water suppliers, local authority for Council tax etc		
Contact type	Electricity	Gas
Account number		
Tel number and/or email		
Contact type	Water and sewage	Council tax
Account number		
Tel number and/or email		
Contact type	Oil / Wood supplier	Internet/broadband
Account number		
Tel number and/or email		
Contact type	Satellite TV / other	Telephone landline
Account number		
Tel number and/or email		

Other useful contacts	
Local police	
Out of hours doctor	
Emergency gas	
Emergency water	
Landlord	
Other	

Financial

DO NOT RECORD PIN NUMBERS OR ANY PERSONAL SECURITY INFORMATION.

Here you can list all the financial assets you have, so none are forgotten in the future. List things like cash accounts, ISAs, National Savings and Premium bonds, endowment and savings policies and personal pensions.

	You	Your spouse/partner
Organisation		
Tel number and/or email		
Account type Eg: ISA		
Account number		

Organisation		
Tel number and/or email		
Account type Eg: ISA		
Account number		

Organisation		
Tel number and/or email		
Account type E.g: ISA		
Account number		

Organisation		
Tel number and/or email		
Account type Eg: ISA		
Account number		

Organisation		
Tel number and/or email		
Account type Eg: ISA		
Account number		



Debts

	You	Your spouse/partner
Organisation		
Tel number and/or email		
Type Eg: mortgage		
Account number		

Organisation		
Tel number and/or email		
Type Eg: car loan etc		
Account number		

Pensions in payment

	You	Your spouse/partner
State pension	Y/N	Y/N
Work pensions (who with?)		
Private pensions (who with?)		
Annuities (who with?)		

Credit and store cards (DO NOT LIST CARD NUMBERS)

	Issuer	Owner
Card 1 Eg: Visa		
Card 2		
Card 3		

Where do you keep the documents relating to these affairs?

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Insurance Policies

Type	House contents	Buildings
Organisation		
Policy number		
Tel number and/or email		
Renewal date		

Type	Car 1	Car 2
Organisation		
Policy number		
Tel number and/or email		
Renewal date		

Type	Breakdown	Travel
Organisation		
Policy number		
Tel number and/or email		
Renewal date		

Type	Life	Private medical
Organisation		
Policy number		
Tel number and/or email		
Renewal date		

Type	Income protection	Critical illness
Organisation		
Policy number		
Tel number and/or email		
Renewal date		

Type	Long-term care	Boiler
Organisation		
Policy number		
Tel number and/or email		
Renewal date		

Where do you keep your insurance documents?

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Warranties and guarantees

Eg: washing machine, boiler

Type		Type	
Organisation		Organisation	
Account number		Account number	
Tel number and/or email		Tel number and/or email	
Renewal date		Renewal date	

Where do you keep your warranty documents?

Other useful financial information

	You	Your spouse/partner
Tax office		
Tax reference number		
Tel number		
Details of any State benefits being claimed		

Possessions / Assets

Property - rental properties only

	You	Your spouse/partner
Address		
Postcode		
Is the property rented?	Y/N	Y/N
If yes – tenant phone number		
Where are the property deeds kept?		

Vehicles – cars motorbikes, campervans, caravans etc		
	Vehicle 1	Vehicle 2
Type eg: car		
Name of keeper		
Make and model		
Registration no		
Where serviced?		
Next service date?		
Warranty details?		

Where do you keep your motor insurance documents?	
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Other Significant possessions

It is useful to make a note of these to ensure nothing gets lost and anyone dealing with your affairs is fully informed. Examples of significant possessions are: jewellery; art; classic cars and bikes; antiques; furniture; watches; clocks and books.

You	Your spouse/partner

Sentimental possessions – eg: photographs; family memorabilia; letters/cards etc.

You	Your spouse/partner

Letter of wishes

It is useful to keep a Letter of Wishes with your Will so that everyone knows how you would like the above items to be distributed once you have passed on.



Very Important Documents

Details of how you wish to distribute your possessions and when, will be contained in documents like your Will, or in Trust Deeds. How you would like your affairs to be managed if you cannot do this yourself, should be detailed in Powers of Attorney.

WILL

	You	Your spouse/partner
Have you made a Will?	Y/N	Y/N
If yes, who are your beneficiaries?		
Who are your executors?		
Where is your original will kept?		

LIVING WILL

	You	Your spouse/partner
Do you have a Living Will or Advance directive?	Y/N	Y/N
If yes, provide further details. Eg: Location of document		
Do you have a letter of wishes?	Y/N	Y/N
If yes, provide further details. Eg: Location of document		

LASTING POWER OF ATTORNEY		
	You	Your spouse/partner
Have you completed a Financial Power of Attorney?	Y/N	Y/N
If yes, who is/are your Attorney(s)?		
Have you completed a Health and Welfare Power of Attorney?	Y/N	Y/N
If yes, who is/are your Attorney(s)?		
Where are your original documents kept?		

TRUST		
	You	Your spouse/partner
Have you set up a Trust?	Y/N	Y/N
If yes, provide further details. Eg: Name of Trust; location of Trust Deed; general intention of Trust, name(s) of Trustees; Trust assets.		

We suggest you keep a copy of these important documents together with this manual.

Use this box to detail anything else you feel is relevant

Other Important Documents

Record the existence and whereabouts of other documents in this section. This will help someone else to look after your affairs if you can't. You may like to collect all these important documents and keep them with this Manual.

Document	You	Your spouse/partner
Birth certificate		
Marriage certificate		
Property deeds		
Passport		
Driving licence		
National Insurance card/number		
NHS card		
Bus pass/travel card		
Other		

Final Wishes

One of the hardest things for your loved ones to deal with after you have gone will be the arrangements of how to say goodbye.

This can be made so much easier if they know what arrangements you would have liked, and whilst it may not be possible to fulfil all your wishes, they will know where to begin at what will be a difficult time.

The organisation of your own funeral may be emotionally difficult. A good place to start is to think of who you would like to be there; what you would like to be said and by whom; what readings and what music would you like.

You might also like to think about your epitaph and how you would like your family to celebrate your life.

On request, we are able to provide you with a comprehensive document to complete to detail your final wishes, and how you would like things to be organised after your death, which can be kept alongside this manual.

So that your loved ones know what you have decided – please choose the correct statement below:

	You	Your spouse/partner
I have already considered my funeral arrangements and / or prepaid for a funeral plan (please provide details of document locations)	Y/N	Y/N
I have no preferences and wish my loved ones to do what they think is best	Y/N	Y/N
I will describe my funeral wishes in a separate document, held alongside this manual	Y/N	Y/N

And finally...

You may wish to record any online login information or passwords for various services like Amazon, Apple, Windows, your utility companies, etc. or to access your various devices such as your PC, Ipad and Mobile phone.

Please ensure you do not record sensitive information that could result in identity theft or financial crime.

Information type.	You	Your spouse/partner

We hope that you have found the completion of the Magenta Manual to be useful and that having finished it, you will gain some reassurance that all your wishes for the future are properly recorded and can be carried out without undue complications.

Now make sure that you tell someone you trust, where it is, otherwise all your hard work will be in vain.



Magenta

FINANCIAL PLANNING

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