

What is the Personal Affairs Checklist?

The Personal Affairs Checklist (PAC) is an important document designed 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 everyone. Each individual should fill out a separate PAC. Additional copies are available as required. It is organised in three sections as follows;

SECTION A Provides information which might be needed quickly such as your key advisers, the location of your will.

SECTION B Covers your financial affairs, bank accounts, insurance policies and other assets.

SECTION C Covers other general information such as your employment record, membership of clubs etc.

The form is designed to address all requirements in as far as is possible. You only need to fill in those parts which are relevant to you. The PAC should be reviewed on a regular basis and updated and expanded as required.

What do I do with the completed PAC?

The completed PAC will contain personal and confidential information which should not be left lying around. We recommend that either;

- you keep the form in a safe place such as in your bank or with your accountant or solicitor; or
- you give it to someone you trust to hold in a safe place for you.

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

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



C A O G A
*Cumann Árachais Oifigeach
an Ghnáth-Airm*

PERSONAL AFFAIRS CHECKLIST

Name (and Service Number if applicable)

Blood Group _____

Address _____

Date Completed _____

Dates Reviewed 1. _____

2. _____ 3. _____

PAC to be held at _____

SECTION A

MY ADVISERS ARE

Doctor

Name _____

Address _____

Tel _____ Fax _____

e-mail _____

Solicitor

Name _____

Address _____

Tel _____ Fax _____

e-mail _____

Accountant

Name _____

Address _____

Tel _____ Fax _____

e-mail _____

Priest/Clergyman/Religious Adviser

Name _____

Address _____

Tel _____ Fax _____

e-mail _____

Undertaker

(Military Point of Contact for Serving Members)

Name _____

Address _____

Tel _____ Fax _____

e-mail _____

Financial Adviser

Name _____

Address _____

Tel _____ Fax _____

e-mail _____

Other Adviser

Name _____

Address _____

Tel _____ Fax _____

e-mail _____

Other Adviser

Name _____

Address _____

Tel _____ Fax _____

e-mail _____

**IN THE EVENT OF MY DEATH OR INCAPACITY DUE TO SUDDEN ILLNESS
PLEASE CONTACT**

Name _____ Name _____
Address _____ Address _____

Relationship _____ Relationship _____
Tel _____ Fax _____ Tel _____ Fax _____
e-mail _____ e-mail _____
My passport may be found _____

MY WILL (A will should be rewritten upon marriage or other significant life event)

The original of my Will is with/placed in _____
The Will is dated _____
The Will is drawn up by _____
Address _____

The Executor(s) is/are _____

GRAVE PLOT

Title Deeds may be found _____
Graveyard Address _____
Grave Plot reference number _____

FUNERAL ARRANGEMENTS

Further details may be found _____
'Living Will' declaration to family and doctors may be found _____
Medical Research Bequests _____
Location of Donor Cards (e.g. eyes, kidneys) _____
My wishes regarding the care of pets may be found _____
My deed/safe box may be found _____
The key may be found _____ Key Number _____

SECTION B

ACCOUNTS (Bank, Building Society, Post Office, Credit Union, etc.)

I have ___ (number) accounts which are held at the institutions indicated below.

Name of Institution _____	Name of Institution _____
Address _____	Address _____
Tel _____ Fax _____	Tel _____ Fax _____
Account Type _____	Account Type _____
Account Number _____	Account Number _____
Sort Code _____	Sort Code _____

Name of Institution _____	Name of Institution _____
Address _____	Address _____
Tel _____ Fax _____	Tel _____ Fax _____
Account Type _____	Account Type _____
Account Number _____	Account Number _____
Sort Code _____	Sort Code _____

INVESTMENTS (Shares, Unit-Trusts, Prize Bonds, Savings Certificates, etc.)

Type	May be Found

CREDIT CARDS

Type of Card	Institution	Credit Card Number	Expiry Date

MAIN RESIDENCE

Address	Joint Owner (Name & Address)	Telephone Number	Location of Deeds	Mortgage Lender (Name & Address)	Account Number

OTHER PROPERTIES

Address	Joint Owner (Name & Address)	Telephone Number	Location of Deeds	Mortgage Lender (Name & Address)	Account Number

ASSURANCE/INSURANCE POLICIES/PERSONAL PENSION PLANS (e.g. Life, Car, Home & Contents, Health, Pension)

Policy Type	Policy Number	Name, Address & Telephone Number of Insurance Company/Broker	May be Found

SECTION C

CERTIFICATES

My Birth/Marriage Certificates may be found _____

Other documents relating to marriage may be found _____

DETAILS OF EMPLOYMENT

Employer/Company Name _____

Address _____

Employer's Registered Number _____

Military Service Number/Works Number _____

Telephone Number _____

Please Contact _____

Pension Scheme Details _____

OTHER EMPLOYMENT

Employer/Company Name _____

Address _____

Employer's Registered Number _____

Works Number _____

Telephone Number _____

Please Contact _____

Pension Scheme Details _____

DIRECTORSHIPS

Company Names _____

PENSION INCOME

Pension Provider _____

Address _____

Pension Provider's Registered Number _____

Pension Number _____

Telephone Number _____

Please Contact _____

TAXATION

The Tax Office which deals with my affairs is _____

Address _____

Telephone Number _____

The Social Welfare Office which deals with my affairs is _____

Address _____

Telephone Number _____

My Personal Public Service (PPS) Number (RSI No) is _____

PROFESSIONAL BODIES, ASSOCIATIONS, CLUBS & SOCIETIES

Association _____ Association _____

Address _____ Address _____

Contact _____ Contact _____

Association _____ Association _____

Address _____ Address _____

Contact _____ Contact _____

OTHER ASSETS (Antiques, Jewellery, Boat, Caravan, etc.)

Details may be found _____

CONTINUATION SHEET/OTHER DETAILS NOT COVERED ABOVE

This checklist is based upon a document produced by the Institute of Chartered Accountants in Ireland. CAOGA gratefully acknowledges the contribution of the ICAI to its production.

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