formsure

GET IMPORTANT DETAILS TOGETHER

Your Family Information Organiser

A printable pack to help you record where important information is kept. Fill in a little at a time, tell a trusted person where to find it and review it when something changes.

A practical guide with printable worksheets

England and Wales | English PDF | Prepared 16 October 2026

Important paperwork. Made easier.

Before you start

An organisation tool, not a will, LPA, advance decision or authority to access another person's money. It records information and wishes; it does not make them legally binding or change ownership.

How to use this guide

Read the numbered steps first. Then print the worksheets you need, or use their headings in your own protected notes. Repeat a worksheet whenever you need more space. Blank lines are for your information, not something to send to Formsure.

Official information and your choices

This is independent general information and practical organisation help. It is not individual legal, tax, financial or medical advice. It does not replace an official form, your court order or your LPA. Official forms and guidance are free. We charge for this original explanation and worksheet pack.

Check before acting

Processes, forms and fees can change. Use the official links at the end to check the current requirements. No guaranteed result, application checking, personal support service or future updates are included. All examples are fictional.

Your copy

For your own personal or family administration. Do not resell or redistribute. Save a local copy after downloading. Contact info@formsure.co.uk if a file is faulty or you cannot open it.

Your route through the guide

1. Decide what this pack should do

Think about what someone would struggle to find if you were ill or unavailable: the right contact, an insurance policy, a document location or arrange...

2. Keep secrets out of the pack

Do not record passwords, PINs, full card details, security answers, cryptocurrency seed phrases or recovery codes here. Record the service name and th...

3. Start with contacts and document locations

List the people to contact first, then relevant professionals such as your solicitor, accountant, insurer or financial adviser. Confirm their current ...

4. Map the practical finances

List bank and savings providers, pensions, insurance, mortgages, loans, regular bills and subscriptions. The aim is to help someone find the relevant ...

5. Add care and everyday arrangements

You may choose to record useful information about dependants, pets, accessibility needs, routines or caring responsibilities. Keep it practical: who h...

6. Check, share carefully and review

Ask yourself whether a trusted person could find the first useful document or telephone number from the pack. You can test this without showing them e...

Printable worksheets

Start here

Important documents

Money and regular bills

Care, dependants and pets

Digital services and business

Wishes and update log

1. Decide what this pack should do

Think about what someone would struggle to find if you were ill or unavailable: the right contact, an insurance policy, a document location or arrangements for a dependant. Start with those details. You do not need to finish every page in one sitting.

This pack does not appoint anyone to act for you. If you want someone to have decision-making authority, arrange the appropriate formal documents separately. A note saying 'my daughter can use my bank account' is not a substitute for a valid authority.

Write an owner name, completion date and next review date. Mark a page 'not applicable' where appropriate so someone does not have to guess whether you forgot it.

Your next small step

Write down the next action, who will do it and the date to check progress. Keep any question you cannot answer on your follow-up list.

Next action:	
Who / when:	
Question to check:	

2. Keep secrets out of the pack

Do not record passwords, PINs, full card details, security answers, cryptocurrency seed phrases or recovery codes here. Record the service name and the safe route to obtain help instead. A family information folder should not become a ready-made identity theft file.

Use partial account references where possible, such as the last four digits. Keep copies of identity documents separately with suitable protection. If you keep the organiser digitally, use a strong password and a protected backup.

Tell a trusted person where the pack is, who may see it and how access should be arranged. Do not email a completed organiser widely or put it in a publicly shared folder.

Your next small step

Write down the next action, who will do it and the date to check progress. Keep any question you cannot answer on your follow-up list.

Next action:	
Who / when:	
Question to check:	

3. Start with contacts and document locations

List the people to contact first, then relevant professionals such as your solicitor, accountant, insurer or financial adviser. Confirm their current details from a reliable source. Include an alternate contact where useful.

Record where original documents are held: will, LPA, property records, marriage or civil partnership documents, insurance policies and any funeral plan. State who holds them and how to contact that person. Do not send originals away merely to complete this pack.

Make a simple location description that someone else can understand, such as 'labelled blue folder in locked study cabinet'. Avoid publishing the exact location of valuables in a copy shared beyond those who need it.

Your next small step

Write down the next action, who will do it and the date to check progress. Keep any question you cannot answer on your follow-up list.

Next action:	
Who / when:	
Question to check:	

4. Map the practical finances

List bank and savings providers, pensions, insurance, mortgages, loans, regular bills and subscriptions. The aim is to help someone find the relevant organisation, not to give them access. Use the provider, account type, partial reference and statement location.

Record important renewal dates, payment frequency and which account normally pays a bill. For shared bills, write who else is involved and how the arrangement works. Avoid assuming a payment should be stopped just because someone is temporarily unwell.

If you run a business, add key contacts, premises details and the location of essential business records. An organiser does not authorise a relative to trade, sign contracts or operate business accounts for you.

Your next small step

Write down the next action, who will do it and the date to check progress. Keep any question you cannot answer on your follow-up list.

Next action:	
Who / when:	
Question to check:	

5. Add care and everyday arrangements

You may choose to record useful information about dependants, pets, accessibility needs, routines or caring responsibilities. Keep it practical: who has agreed to help, their current contact and what they need to know.

Health information is sensitive. Record only what you are comfortable including, the date checked and who can verify it. Any medication list is a reference to discuss with a clinician or pharmacist, not instructions to start, stop or change treatment.

You can record funeral preferences and who to contact, but discuss formal or binding arrangements with the appropriate provider or adviser. Do not assume wishes in this pack override a will, contract or legal requirement.

Your next small step

Write down the next action, who will do it and the date to check progress. Keep any question you cannot answer on your follow-up list.

Next action:	
Who / when:	
Question to check:	

6. Check, share carefully and review

Ask yourself whether a trusted person could find the first useful document or telephone number from the pack. You can test this without showing them every financial detail. Correct confusing instructions now.

Choose a review reminder, for example every six months and after a house move, new policy or change in family circumstances. Date changed pages and securely destroy obsolete copies so conflicting versions do not circulate.

Keep a small update log. If you give someone a copy, note who has it and tell them when a replacement is available. Keep the original somewhere accessible to the right person but protected from casual access.

Your next small step

Write down the next action, who will do it and the date to check progress. Keep any question you cannot answer on your follow-up list.

Next action:	
Who / when:	
Question to check:	

Start here

Print another copy if you need more space. Keep completed sheets securely.

Owner name / completed / review date

Main trusted contact / telephone

Second contact / telephone

Where this organiser is kept

Who may access it / agreed arrangements

Important immediate responsibilities

Important documents

Print another copy if you need more space. Keep completed sheets securely.

Document type

Original held by / location

Contact and partial reference

Date last checked

Access instructions without passwords

Question or action still outstanding

Money and regular bills

Print another copy if you need more space. Keep completed sheets securely.

Provider / account or policy type

Partial reference only

Statement or policy location

Bill / amount or estimate / frequency

Renewal or review date

Contact route / joint arrangement

Care, dependants and pets

Print another copy if you need more space. Keep completed sheets securely.

Person or pet / routine

Main helper / consent to contact

Backup helper / contact

Relevant professional contact

Essential document or information location

Date details checked

Digital services and business

Print another copy if you need more space. Keep completed sheets securely.

Service or business contact

Purpose / partial reference

Official help or recovery route

Records location

Business continuity contact if agreed

Never add passwords, PINs or recovery secrets

Wishes and update log

Print another copy if you need more space. Keep completed sheets securely.

Wishes to discuss / person to contact

Formal document needed / adviser

Date updated / page changed

Who has a copy / replacement sent

Old copies securely destroyed

Next review date

Official links and useful words

Checked 16 October 2026. Open the official page for the current instructions and fees. Links are clickable in this PDF.

1. https://www.gov.uk/power-of-attorney

2. https://www.gov.uk/make-will

3. https://www.ncsc.gov.uk/collection/top-tips-for-staying-secure-online

In everyday language

Authority: what you are allowed to do. Evidence: records that support what you say. Reference: the number used to identify your case or account. Reconcile: check that your records and the statements agree. Keep a note of unfamiliar words and check their meaning before acting.

Source acknowledgement

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