

ICE

In Case of Emergency



HFMC WEALTH

ICE – In Case of Emergency

If you were in an accident today, hospitalised or were otherwise incapacitated, would your most trusted people be able to quickly locate your important information and know how to handle your affairs? If you had to evacuate your home because of fire or flood, would you be afraid your vital records might be not be there on your return?

Many of us are well organised, but our personal documents, contact information and passwords might not be known by family members or friends who might need immediate access to them in times of emergency. With this ICE (In Case of Emergency) collation, you can organize your vital information so it can be conveniently and securely accessed by those with your permission when needed.

Think of this document as a guide to your trusted people to show them “where to find” information that they will need in order to take over your affairs, hopefully temporarily.

If you prefer to keep your details in analogue format, then just record the whereabouts of key information on this document.

If you prefer the idea that your important information is more easily kept up to date (especially passwords) and that it is all backed up and secure from burglary/fire/flood, then digital is the way to go and this form can be completed with key information, uploaded into ICE and used as a summary and checklist for documents that need to be found and uploaded into your HFMC Connect ICE folder.

SCAN PAPER FILES TO DIGITAL FILES

Once you’ve gathered your paper documents for your ICE File, you’ll need to create their digital equivalent via scanning. If you don’t have a scanner then you can take a photograph of the key pages with your phone, or use applications such as Genius Scan or Adobe Scan. Some newer printers have a ‘scan to pdf’ function. You can give your documents titles to more easily identify them and organise them in HFMC Connect.

If you’d like help creating and staying on track with your ICE File, please contact your HFMC Wealth adviser.

Log of your important information:

CONTACTS

Your contact information	_____	_____
	_____	_____
Your emergency contacts	_____	_____
	_____	_____
	_____	_____
	_____	_____
Your employer	_____	_____
	_____	_____
Your financial adviser	_____	_____
	_____	_____
Your trusted friends	_____	_____
	_____	_____
	_____	_____
	_____	_____
Your beneficiaries	_____	_____
	_____	_____
	_____	_____
	_____	_____
Your children's schools	_____	_____
	_____	_____
	_____	_____
	_____	_____
Your doctor	_____	_____
	_____	_____

Your medical directives

Your key business contacts

Your solicitor

Your accountant

Your tax office

BUSINESS

Contract of employment

CARS

Make/model

Proof of purchase

V5

Car insurance policy and certificate

Location of keys

Lease information

CERTIFICATES/LICENCES

DOCUMENT

Birth

_____	_____
_____	_____

Marriage

_____	_____
_____	_____

Divorce

_____	_____
_____	_____

Your passport no

_____	_____
_____	_____

Civil partnership

_____	_____
_____	_____

Driver's licence

_____	_____
_____	_____

ID cards

_____	_____
_____	_____

TV licence

_____	_____
_____	_____

Adoption/foster records

_____	_____
_____	_____

Naturalisation/immigration documents

_____	_____
_____	_____

Church records

_____	_____
_____	_____

DEEDS

Property(ies)

_____	_____
_____	_____
_____	_____
_____	_____

Your will

_____	_____
_____	_____

Your living will

_____	_____
_____	_____

Your will executor(s)

_____	_____
_____	_____
_____	_____
_____	_____

Your will is held by:

_____	_____
_____	_____

Your solicitor (who holds your original documents)

_____	_____
_____	_____

Your trustees

_____	_____
_____	_____

Powers of Attorney for yourself

_____	_____
_____	_____

Has it been registered?

_____	_____
_____	_____

Powers of Attorney for others

_____	_____
_____	_____

IMMEDIATE FAMILY TREE

Spouse/partner

Parents

Grandparents

Children

Brothers and sisters

FINANCIAL

Tax reference

NI number

Bank 1

Contact details

Account details

Passwords

Bank 2

Contact details

Account details

Passwords

Bank 3

Contact details

Account details

Passwords

INVESTMENTS

Bonds/unit trust

ISA/PEP

Savings/Life assurance

Stocks/shares

Premium bonds/National savings

Pension(s)

Safety deposit details

Other assets

CREDIT CARD(S)

Credit Card 1	_____	_____
	_____	_____
Credit Card 2	_____	_____
	_____	_____
Credit Card 3	_____	_____
	_____	_____

LOANS

Company	_____	_____
Amount	_____	_____
Reference	_____	_____
Company	_____	_____
Amount	_____	_____
Reference	_____	_____
Company	_____	_____
Amount	_____	_____
Reference	_____	_____
Company	_____	_____
Amount	_____	_____
Reference	_____	_____

Claiming the transferable nil rate band:

When an individual who has been previously married or in civil partnership dies, a claim can be made to transfer the nil rate band, where any part of it was unused, from the spouse or civil partner who died first. The following documents will be needed in support of such a claim.

Copy of Grant of Representation (confirmation in Scotland) of deceased spouse/civil partner:

_____	_____
_____	_____
_____	_____

Will of deceased spouse/civil partner:

Any Deed of Variation or disclaimer executed in respect of property inherited from a deceased spouse/civil partner:

Death certificate of deceased spouse/civil partner:

GIFTS

Made during my lifetime

INSURANCES

Buildings

Contents

Car

Medical

Life

Disability

Critical illness

Guarantees for domestic appliances

Other

MEDICAL

Medical history for serious illnesses/diseases

Current prescriptions

Immunization records

Allergies

Dietary restrictions

Medications

Surgical treatments

Dentist

Advanced care directives

Long term care plan

Medical power of attorney

FUNERAL ARRANGEMENTS

Funeral arrangements

ORGANISATIONS AND CLUBS

Name and membership no:

Name and membership no:

Name and membership no:

Name and membership no:

PETS

Description

Vet contact information

Important medical notes

Insurance

Description

Vet contact information

Important medical notes

Insurance

Description

Vet contact information

Important medical notes

Insurance

Description

Vet contact information

Important medical notes

Insurance

PROPERTIES

Address 1 _____
Home inventory _____
Rare and valuable item documentation _____
Purchase information _____
Mortgage or tenancy agreement _____
Storage unit(s) _____
Utility suppliers: water/electricity/gas _____

Address 2 _____
Home inventory _____
Rare and valuable item documentation _____
Purchase information _____
Mortgage or tenancy agreement _____
Storage unit(s) _____
Utility suppliers: water/electricity/gas _____

SUBSCRIPTIONS

Name/membership no: _____

Name/membership no: _____

Name/membership no: _____

Name/membership no: _____

YOUR KEY WEBSITES

Social media

Other

Digital password for
key websites:

USEFUL WEBSITES

When dealing with an estate

www.direct.gov.uk

www.theprobateservice.gov.uk

www.citizensadvice.org.uk



NOTES





NOTES





HFMC WEALTH

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