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# The Hartley household

Important information for the people who may need to help

## PREPARED BY

Margaret and Tom Hartley

## LAST UPDATED

2026-10-12

## WHO SHOULD FIND THIS FOLDER, AND WHERE IT IS KEPT

Our daughter Maya should find this first. The printed copy is in the blue folder in the hall drawer; Maya also has the file on her computer.

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## A NOTE TO WHOEVER OPENS THIS

If you are reading this, something has happened and you need to sort things out for us. Take your time. Nothing here is urgent except the first page. Thank you for doing this.

What this folder is: a plain record of who to call, where things are and what keeps the household running. What it is not: a legal document, a will, a medical directive or a place for passwords. Those live elsewhere; this folder says where.

# If something happens: start here

The essentials from the rest of this folder, on one page. Everything here appears again in full later.

## Call first

### **Maya Hartley-Osei • 07700 900123**

Daughter — First call, any hour. Has a spare key and knows where everything is.

### **Daniel Hartley • +1 212 555 0142 (USA, 5 hours behind)**

Son — Second call. Please ring Maya first so they can speak together.

### **Ruth Patel • 07700 900456**

Neighbour, no. 14 — Can be at the house in two minutes. Feeds the cat if we are away.

## Where to look

### **Wills (both of us)**

Originals with our solicitor; a signed copy in the grey document box, top of the wardrobe in our bedroom.

### **Passports and birth certificates**

Grey document box, top of the wardrobe (envelope marked “ID”).

### **House deeds**

Held by the mortgage lender; the completion letter is in the grey box.

### **Car documents (log book, MOT)**

Glove box of the car and the green folder in the study.

## The house

**Spare front-door key with Ruth at no. 14. A second spare is in the key safe by the back door; Maya knows how to open it. The shed key hangs inside the kitchen cupboard, left of the sink.**

## People and pets who need someone today

### **Biscuit (cat, 9 years old)**

Dry food morning and evening, one scoop each; fresh water. Likes to be let out after breakfast and comes back by dark.  
Vet: Orchard Vets, 07700 900888.

### **Tom’s mother, Edith (care home)**

Lives at Rosewood House, Westbury. We visit on Sundays and bring her the newspaper. The home should be told if we cannot come.

## Doctor

### **Westbury Medical Practice, Dr Amara Ahmed, 07700 900444**

## Care wishes and documents

**We have both signed lasting powers of attorney (health and finance) naming Maya. The originals are with our solicitor; copies are in the grey document box. Our wishes about care are written in a letter in the same envelope.**

## Online accounts

We use a password manager. Maya has been set up as our emergency contact in it and knows how to request access; nothing is written down anywhere else. Our email accounts are inside the password manager.

# People to call

The people who should hear first, in the order you would call them. This is the most useful page in the folder.

## Maya Hartley-Osei

**RELATIONSHIP**

Daughter

**PHONE**

07700 900123

**OTHER WAY TO REACH THEM**

maya@example.com · lives in Bristol

**WHEN TO CALL THEM AND WHAT THEY CAN HELP WITH**

First call, any hour. Has a spare key and knows where everything is.

## Daniel Hartley

**RELATIONSHIP**

Son

**PHONE**

+1 212 555 0142 (USA, 5 hours behind)

**OTHER WAY TO REACH THEM**

daniel@example.com

**WHEN TO CALL THEM AND WHAT THEY CAN HELP WITH**

Second call. Please ring Maya first so they can speak together.

**Ruth Patel****RELATIONSHIP**

Neighbour, no. 14

**PHONE**

07700 900456

**OTHER WAY TO REACH THEM**

Next door, green front door

**WHEN TO CALL THEM AND WHAT THEY CAN HELP WITH**

Can be at the house in two minutes. Feeds the cat if we are away.

**Rev. Alan Boyd****RELATIONSHIP**

Friend, St Mark's

**PHONE**

07700 900789

**WHEN TO CALL THEM AND WHAT THEY CAN HELP WITH**

Knows our wishes about a service. No rush.

# Where the documents are

Not the documents themselves — just where each one is and who can get to it. No scans, no numbers.

## Wills (both of us)

**WHERE IT IS**

Originals with our solicitor; a signed copy in the grey document box, top of the wardrobe in our bedroom.

**WHO HOLDS IT OR CAN ACCESS IT**

Osei & Clark Solicitors, Mrs Grace Osei, 07700 900222

**NOTE**

Updated in 2024 after Daniel moved abroad.

## Passports and birth certificates

**WHERE IT IS**

Grey document box, top of the wardrobe (envelope marked “ID”).

## House deeds

**WHERE IT IS**

Held by the mortgage lender; the completion letter is in the grey box.

**WHO HOLDS IT OR CAN ACCESS IT**

Our solicitor has the file reference.

## Car documents (log book, MOT)

**WHERE IT IS**

Glove box of the car and the green folder in the study.

**NOTE**

Insurance renews each April.

## Pension letters and bank correspondence

### WHERE IT IS

Green folder in the study, second shelf, and the email folder called “Money”.

### WHO HOLDS IT OR CAN ACCESS IT

Maya has emergency access to the email account through the password manager.

# Home and household

What keeps the house running when you are not there to run it.

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## ADDRESS OF THE HOME THIS FOLDER COVERS

22 Orchard Lane, Westbury, United Kingdom

## KEYS

Spare front-door key with Ruth at no. 14. A second spare is in the key safe by the back door; Maya knows how to open it. The shed key hangs inside the kitchen cupboard, left of the sink.

## LANDLORD, PROPERTY MANAGER OR BUILDING CONTACT

Freehold, no landlord. Boiler service contract with Westbury Heating, 07700 900333.

## UTILITIES AND SUPPLIERS

Electricity and gas: Northfield Energy, paid monthly by direct debit. Water: Severn Water, paid quarterly. Internet and landline: Orchard Broadband, paid by card on the 3rd. All statements arrive by email.

## WHAT MUST NOT BE MISSED

The cat, Biscuit — see “People and pets”. Bins go out Tuesday evening. In winter keep the heating on at least 12 °C so the pipes do not freeze. The tomato plants in the greenhouse need water every other day in summer.

## Insurance and advisers

The policies and the professionals who already know your situation.

### Home insurance (buildings and contents)

#### COMPANY OR PERSON

Bramley Mutual

#### HOW TO CONTACT THEM

0808 157 0150 · our policy folder has the agent's name

#### WHERE THE PAPERWORK IS

Green folder in the study, section "Insurance"

#### NOTE

Renews every March; they send a letter first.

### Life insurance (Tom)

#### COMPANY OR PERSON

Larkspur Life

#### HOW TO CONTACT THEM

0808 157 0199

#### WHERE THE PAPERWORK IS

Green folder, section "Insurance"; the beneficiary form is with the will.

### Accountant

#### COMPANY OR PERSON

Mr Peter Lindqvist, Lindqvist & Co

#### HOW TO CONTACT THEM

07700 900555 · peter@example.com

#### WHERE THE PAPERWORK IS

He holds the last six years of tax returns.

#### NOTE

Does our self-assessment every January.

## People and pets who depend on you

Children, dependants and animals: what they need and who else can step in.

### Biscuit (cat, 9 years old)

#### WHAT THEY NEED AND WHEN

Dry food morning and evening, one scoop each; fresh water. Likes to be let out after breakfast and comes back by dark. Vet: Orchard Vets, 07700 900888.

#### WHO ELSE CAN CARE FOR THEM, AND HOW TO REACH THEM

Ruth at no. 14 has looked after him many times. Maya would take him if we could not.

### Tom's mother, Edith (care home)

#### WHAT THEY NEED AND WHEN

Lives at Rosewood House, Westbury. We visit on Sundays and bring her the newspaper. The home should be told if we cannot come.

#### WHO ELSE CAN CARE FOR THEM, AND HOW TO REACH THEM

Rosewood House reception, 07700 900666. Tom's sister Carol, 07700 900777, visits on Wednesdays.

## Health contacts

Who your doctor is and where your own existing care documents are. This folder gives no medical advice and never asks for diagnoses or medication lists.

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### DOCTOR OR PRACTICE

Westbury Medical Practice, Dr Amara Ahmed, 07700 900444

### PHARMACY

Lane End Pharmacy, 07700 900999 — they know our repeat prescriptions

### WHERE YOUR EXISTING CARE WISHES OR MEDICAL DOCUMENTS ARE KEPT

We have both signed lasting powers of attorney (health and finance) naming Maya. The originals are with our solicitor; copies are in the grey document box. Our wishes about care are written in a letter in the same envelope.

### NOTE

Maya usually comes with us to hospital appointments.

# Digital life

Where the instructions for your online accounts are — not the passwords themselves.

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## WHERE INSTRUCTIONS FOR YOUR ONLINE ACCOUNTS ARE KEPT

We use a password manager. Maya has been set up as our emergency contact in it and knows how to request access; nothing is written down anywhere else. Our email accounts are inside the password manager.

## PHONES AND COMPUTERS

Tom's laptop (black, in the study) and both our phones. Maya can unlock the phones; the laptop opens with Tom's fingerprint or Maya's access via the password manager.

## SUBSCRIPTIONS AND SERVICES

Keep: the broadband, the phone contracts (until things are settled). Cancel: the newspaper delivery, the garden magazine, the streaming subscription. The domain name hartleyfamily.example is paid yearly and can lapse.

## What is still missing

These sections were skipped or left empty. They are listed for a later conversation, not to fill the space. Nothing in this folder is invented.

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Every section has at least one answer.