

A simple, respectful guide, to talking about where our important documents are

Is it time for a cuppa and a chat?

Before You Start

- Choose a calm, private time and place
- Avoid stressful or emotional moments
- Plan a gentle, practical way to introduce the topic
- Choose someone you think might be able to help you take action on the topic; this person does not have to be the person responsible for taking care of everything after your death, but someone who you think you can talk to about it

Starting the Conversation

- Begin with a neutral reason (e.g. getting organised)
- Emphasise peace of mind, not death
- Ask permission to talk about it
- Respect their response if they hesitate, they just might not be the right person to help you with this.

What to Talk About

- Will
- Power of attorney
- Bank and savings information
- Insurance policies
- Property or housing documents
- Pension details
- Any written instructions or plans



Location, Not Control

- Make clear you only need someone to know where things are
- Reassure them that you are going to stay in control
- Do not offer access, unless you REALLY want to

Organisation Options

- Folder or binder with labelled sections
- Written list of document locations
- Secure digital file
- Sealed envelope with key details

If you have trusted people:

- Identify 1–2 trusted individuals
- Confirm who should be contacted if needed
- Make sure the plan is clear and consistent

If you do NOT have trusted people:

- Consider a solicitor or legal professional
- Consider a bank safe deposit box
- Store a written plan securely at home
- Consider a professional executor or trustee
- Use a password manager with emergency access

During the Conversation

- Keep the tone calm and practical
- Break it into small steps if needed
- Watch for discomfort and pause if necessary
- Acknowledge that it can be a difficult topic



Asking for Help

- Ask if they would be willing to help organising things if you need it
- Reiterate, it is not them making the decisions
- Respect your boundaries and pace, and the boundaries and pace of the other person

Ongoing Check-ins

- Revisit the topic occasionally (e.g. once a year)
- Check if anything has changed
- Update information if needed

Simple Conversation Starter

"I've realised how stressful it can be when people don't know where important paperwork is. Would you be okay with me telling you where I keep mine, just so it's easier if anything ever comes up?"

Find more helpful: [websites: www.opaal.org.uk/campaigns/](http://www.opaal.org.uk/campaigns/)