



THE ESSENTIAL LIFE ADMIN CHECKLIST

A practical guide to getting everything important in one place

Why this matters

Most households are managing dozens of documents, deadlines and renewals across emails, folders and memory.

Not because it's difficult.
Because it's constant.

This guide helps you identify what actually matters — and get it organised.

1. IDENTITY & LEGAL

Start with the documents that prove who you are.

- Passport
 - Birth certificate
 - Driving licence
 - Marriage / civil partnership certificate
 - Divorce certificate (if applicable)
 - National Insurance details
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Add key information:

- Expiry dates (passport, licence)
 - Legal name(s) and any variations
 - Emergency contact details
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2. HOME & PROPERTY

Everything connected to where you live

- Mortgage agreement / tenancy agreement
- Title deeds / lease documents
- Home insurance policy
- Council tax details
- Utility accounts (gas, electricity, water)

Add key information:

- Renewal dates
 - Account numbers
 - Supplier contact details
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3. FINANCES & TAX

Often the most fragmented — and the hardest to retrieve quickly.

- Bank account details
- Loan or credit agreements
- Tax returns / UTR number
- Payslips / P60s / P45s
- Investment or ISA summaries

Add key information:

- Payment schedules
 - Filing deadlines
 - Adviser / accountant details
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4. INSURANCE & PROTECTION

Where missing something has a direct cost.

- Car insurance
- Home / contents insurance
- Life insurance

- Pet insurance
- Travel insurance

Add key information:

- Renewal dates
 - Policy numbers
 - Excess amounts
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5. HEALTH & MEDICAL

Needed most when you're least prepared.

- NHS numbers (family)
- Prescription information
- Immunisation records
- Private medical cover
- Care plans / EHCP

Add key information:

- Medication details
 - GP / consultant contact details
 - Emergency medical notes
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6. VEHICLES & TRANSPORT

Time-sensitive and easy to overlook.

- V5 logbook
- MOT records
- Driving licence
- Service history
- Breakdown cover

Add key information:

- MOT due date
- Insurance renewal date
- Service schedule

7. WORK & INCOME

Documents that underpin employment and earnings.

- Employment contracts
- Pension statements
- Professional qualifications
- Industry certifications
- Benefit statements

Add key information:

- Renewal or review dates
 - Employer contact details
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8. SUBSCRIPTIONS & MEMBERSHIPS

Small costs that add up — and are easy to forget.

- Streaming services (Netflix, Disney+, etc.)
- Gym memberships
- Professional memberships
- Railcards / travel passes
- App subscriptions

Add key information:

- Renewal dates
 - Monthly / annual cost
 - Cancellation terms
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9. FAMILY & EDUCATION

Highly fragmented and often time-sensitive.

- School reports
- Timetables
- Education plans (EHCP)
- Child benefit details
- Student loan information

Add key information:

- Key contacts (school, college, etc.)
 - Important dates
 - Application deadlines
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10. WILLS & FUTURE PLANNING

The documents no one wants to need — but everyone eventually does.

- Will
- Lasting Power of Attorney
- Life insurance documents
- Funeral plans
- Key family instructions

Add key information:

- Executors and attorneys
 - Location of original documents
 - Access instructions
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CREATE YOUR OWN CATEGORIES

Not everything fits neatly into folders.

Create categories for:

Life events

- Moving house
- New baby
- Bereavement
- Divorce / separation

People

- Each family member
- Dependants

Assets

- Car
- Pets
- Rental properties

Projects

- Holidays
 - Renovations
 - Tax year organisation
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DON'T JUST STORE DOCUMENTS

Also capture the information you usually forget:

- Account numbers
- Renewal dates
- Contact details
- Notes and instructions

This is what turns documents into something usable.

WHERE TO START (5-MINUTE RESET)

If you do nothing else, start here:

- Passport
- Car insurance
- Home insurance
- One bill or account
- One family document

That's enough to feel the difference.

FINAL THOUGHT

You don't need to organise everything. You just need to know where the important things are — when it matters.