

My Bereavement Notebook

For all the things your head simply isn't going to remember.

Get an ordinary folder and a packet of clear punched pockets. Each working page can be printed more than once. Date things so you can check when you contacted an organisation or person.

What Actually Needs Done Next?

Don't start by trying to sort out everything. What are the few things that actually need your attention now?

1.

2.

3.

4.

5.

Only these five things belong on this page. Everything else can go on the later lists until it genuinely needs your attention.

Important Contact

Use one copy for each person or organisation you are dealing with most often.

Print extra copies of this page whenever you need them.

Person / organisation

What are they dealing with?

Person I am speaking to

Phone

Email

Reference / case number

Useful notes

Who Did I Speak To?

Use this page for an important phone call, email, appointment or conversation.

Print extra copies of this page whenever you need them.

Date		Time	
Person / organisation		Phone / email	
Who did I actually speak to?		Reference / case number	

What did they tell me?

What do I need to do?

Do they need anything from me?

- ☐ Nothing
- ☐ Death certificate
- ☐ Form
- ☐ Identification
- ☐ Other documents
- ☐ Something else

Deadline, if there is one

- ☐ I need to follow this up
- ☐ DONE

Follow-up date

Things I Need to Do

This is the dumping ground. If something comes into your head, put it here. You can work out when it actually needs done later.

Print extra copies of this page whenever you need them.

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Things I'm Waiting For

Sometimes you've done your bit and you're waiting for somebody else. Write that down too, otherwise a week later you can find yourself wondering, 'What happened with that?'

Print extra copies of this page whenever you need them.

Waiting for	From whom?	Date	Chase on

Numbers, Codes and References

For all those random numbers people suddenly expect you to keep track of.

Print extra copies of this page whenever you need them.

Reference 1

Organisation	
Reference / number	
What it is for	

Reference 2

Organisation	
Reference / number	
What it is for	

Reference 3

Organisation	
Reference / number	
What it is for	

Reference 4

Organisation	
Reference / number	
What it is for	

Reference 5

Organisation	
Reference / number	
What it is for	

Questions I Need to Ask

You will think of questions when nobody is available to answer them. Write them here rather than trying to remember them.

Print extra copies of this page whenever you need them.

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

