

Household admin checklist

The one-weekend reset

This checklist works through everything a UK household should have organised. It is designed to be completed in a Saturday morning, not a week. Tick what applies. Cross out what does not. Come back to update it once a year.

For individuals and families wanting to get on top of life admin. Print or share.
Update annually.

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SECTION 01

ID and legal documents

- ☐ Passports — location and expiry dates recorded.
- ☐ Driving licences — location and expiry dates.
- ☐ Birth certificates.
- ☐ Marriage or civil partnership certificate.
- ☐ Adoption or naturalisation documents if applicable.
- ☐ Will — location and last updated.
- ☐ LPAs — location and registered date.

SECTION 02

Property

- ☐ Property deeds or Land Registry title numbers.
- ☐ Mortgage details — lender, account number, renewal date.
- ☐ Rental agreement if renting — landlord contact, end date.
- ☐ Home insurance policy — provider, renewal date, contents value.
- ☐ Boiler service records.
- ☐ Warranty documents for major appliances.

SECTION 03

Utilities and services

- ☐ Electricity — provider, account, meter reading date.
- ☐ Gas — provider, account.
- ☐ Water — provider, account.
- ☐ Council tax — band, direct debit setup.
- ☐ Broadband — provider, contract end date.
- ☐ Mobile phones — provider per person, contract end dates.
- ☐ TV licence.

SECTION 04

Vehicles

- ☐ Vehicle registration documents (V5C).
- ☐ MOT expiry dates.
- ☐ Road tax renewal dates.
- ☐ Vehicle insurance — provider, renewal date.
- ☐ Breakdown cover — provider, renewal date.
- ☐ Service history.

SECTION 05

Financial accounts

- ☐ Main current account.
- ☐ Savings accounts.
- ☐ ISAs — cash and stocks & shares.
- ☐ Investment accounts.
- ☐ Credit cards.
- ☐ Loans or overdrafts.
- ☐ Pensions — state, workplace, and any previous employer schemes.
- ☐ Emergency fund — where is it, how many months of expenses.

SECTION 06

Insurance

- ☐ Life insurance policies.
- ☐ Income protection.
- ☐ Critical illness cover.
- ☐ Private medical insurance.
- ☐ Home contents.
- ☐ Travel insurance if annual.
- ☐ Pet insurance.

SECTION 07

Subscriptions

- ☐ Streaming — Netflix, Disney+, Prime, Apple TV, etc.
- ☐ Music — Spotify, Apple Music.
- ☐ Cloud storage — Google One, iCloud, Dropbox.
- ☐ Software — Microsoft 365, Adobe, others.
- ☐ Gym memberships.
- ☐ Magazine or newspaper subscriptions.
- ☐ Meal-kit or delivery boxes.
- ☐ Charity direct debits.

SECTION 08

Family and health

- ☐ GP surgery details for each family member.
- ☐ Dentist.
- ☐ Optician.
- ☐ NHS number for each family member.
- ☐ Any repeat prescriptions.
- ☐ Vaccination records for children.
- ☐ Emergency contacts.

This is a general household planning template. It is not financial advice. For advice on pensions, investments or complex financial planning, consult a regulated financial adviser.