



YOUR FINANCIAL RECORD

Taking the time to complete this simple financial record allows you to store all the information relating to your finances in one place. It will prove an indispensable resource for the management of your wealth. It also sets out clearly where everything can be found and will help your loved ones, attorneys or executors manage your estate when it is time for them to step in. Please keep it safe!

WARNING

Please ensure that you store your financial record in a safe and secure location as some of the information within it is particularly sensitive.

Date Completed:	
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INFORMATION AND ASSETS OF:

Name:	
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Address:	
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Date of Birth:	
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National Insurance Number:	
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WILL:

Date:	
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Location:	
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Executor Name (1):	
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Address (1):	
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Executor Name (2):	
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Address (2):	
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LASTING POWERS OF ATTORNEY:

Location	Registered Y/N	Attorney's Name and Address	Contact
Health & Welfare LPA:			
Property Finance LPA:			
Do you act in a legal/ nominated capacity for anyone else:	For example, trustee, attorney, deputy executor - details of role, contact details of who to notify if you are incapacitated		

PERSONAL AND PROFESSIONAL ADVISERS:

	Name and Address	Contact
Doctor's Name:		
Dentist Name:		
Solicitor Name:		
Accountant Name:		
Bank Name:		
Financial Adviser Name:		

ASSETS:

Properties:	
Address (1):	
Ownership (1):	
Mortgage Lender (1):	
Mortgage Account Numer (1):	
Address (2):	
Ownership (2):	
Mortgage Lender (2):	
Mortgage Account Number (2):	

UTILITIES & BILLS:

Water:	
Gas:	
Electricity:	
Council Tax:	
TV Licence:	
Phone/Internet/Cable:	

LOCATIONS OF IMPORTANT DOCUMENTS:

Property Deeds:	
Stocks & Shares Certificates:	
Pensions & Life Assurance Policies:	
Contracts: (e.g. HP & Loan Agreements)	
Safety Deposit Box & Key:	
Personal Papers:	
Passports:	
Bank Statements:	
Birth Certificate:	
Online Passwords:	
Others (specify):	

PRE-PAID FUNERAL:

Provider:	
Policy Reference:	
Provider Contact Details:	

Other Information:	e.g car keys, log book, etc
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