



PERSONAL INFORMATION LOG

Name:

Address:

Date of birth:

Other: e.g. date of marriage:

ESSENTIAL INFORMATION

Location of Will:

Funeral Wishes:
(Consider using the free Funeral Arrangements Form on this website)

Details of any Living Will:

PERSONAL INFORMATION

Executor(s):

Solicitor:

Accountant:

Employer/self employed details:

H M Inspector of Taxes:

Address:

Reference:

Location of copy tax returns:

Doctor:

Location of personal documents:

e.g. birth/marriage certificates, bank books, investment certificates etc.

ASSETS and LIABILITIES

Address of main residence:

Name of any joint owner:

Name, address and account number of any mortgage lender:

Estimated value:

Other properties:

Name, address and account number of any mortgage lender:

Estimated value:

Shares/securities not held by stockbroker and name of any joint holder:

National Savings investments:

Bank/Building Society accounts:

Pension/Insurance arrangements:

Other assets:

Credit cards:

Other liabilities:

CANCELLATION/NOTIFICATION

Membership of professional bodies:

Membership of clubs:

Vehicle registration documents:

Hire purchase or similar agreements:

Other:

e.g. passport, magazine subscription

TRUST ARRANGEMENTS

Details of any settlements set up, or details of any settlements in which there is an interest:

(Include details of type of trust, trustees and location of trust deed)

INHERITANCE TAX HISTORY

(Include details of transaction, date, value and name and address of the person to whom the gift was made)

ADDITIONAL MATTERS

Signature:

Date: