

My Assets Log

Please store these details securely.
You may also wish to provide us with a sealed copy to place with your Will.

Name:	
Address:	
National Insurance Number:	
Tax Reference:	
Date of Birth:	
	<u>Key Contacts</u>
Solicitor Name, Address & Contact:	
Accountant Name, Address & Contact:	
Doctor Name, Address & Contact:	



Tax Office Name, Address & Contact:	
Employer Name, Address & Contact:	
Others:	



My Will

The original of my Will is held with:	
The Will is dated:	
The Will was drawn up by:	
My Executors are:	
Beneficiaries (name address and contact	
details):	



Funeral Arrangements

The death of a loved one is in no doubt a very stressful time. We can lessen the stress for those we leave behind by making our wishes for our funeral known beforehand.

Below is a list of questions you may find helpful to complete so that your next of kin and loved ones know from the outset what your wishes are. But please remember, you do not need to answer any of them if you do not wish to.

1.	Cremation or B	Burial?			
		Cremation		Burial	
	If Cremation , a	re Your Ashe	s to be	Interred or So	cattered?
	I	Interred		Scattered	
	ere you would like cattered? (Please				ou like your Ashes to be Interred may apply):
2.	Service in Chur	r ch? Yes □]	No □	
lf y€	es, which church?				
3.	The Service				
Mus	sic at entry?	Yes □]	No □	
Hyn	nns to sing?	Yes □]	No □	



If **yes**, list up to three:

1.			
2.			
2			
Reading?	Yes □ No	D 🗆	
If yes , please give details h	nere:		
Music at exit?	Yes □	No □	
Any other wishes or reque	ests? Yes □	No □	
If yes , please give details h	nere:		



Claiming the Transferable Nil Rate Band

When an individual who has been previously married or in a civil partnership dies, a claim can be made to transfer the nil rate band, where any part of it was unused, from the spouse or civil partner who died first.

The following documents will be needed to support such a claim. **Please record their location in this section.**

1.	Copy of the Grant of Administration (Confirmation in Scotland) of the deceased spouse/civil partner:
 2. 	Will of deceased spouse/civil partner:
3.	Any Deed of Variation or disclaimer executed in respect of property inherited from a deceased spouse/civil partner:
 4. 	Death certificate of deceased spouse/ civil partner:



Powers of Attorney

This section includes Lasting Powers of Attorney and Enduring Powers of Attorney.
Date made:
Name & Address of Attorneys:
Has the document been registered at the Office of the Public Guardian? Yes □ No □



My Assets

Please use this section to record any investments, savings, life assurance, stocks and shares and any other assets such as premium bond/national savings.

Bond/Unit Trusts Name	Investment Details	Plan or Account Number	Contact
ISAs	Investment Details	Plan or Account Number	Contact



Savings & Life Assurance Plans	Investment Details	Plan or Account Number	Contact
Stocks & Shares	Investment Details	Plan or Account Number	Contact



Other Assets e.g. Premium Bonds/National Savings	Investment Details	Plan or Account Number	Contact

Any additional		



My Pension

Provider's Name and Address	Latest Pension Value	Plan Number	Contact

Any additional informa	ation:	



My Property

Main Residence

Address	Approximate Value	Ownership	Outstanding Loan

Other Property

Address	Approximate Value	Ownership	Outstanding Loan



Any additional information:



Gifts Made During Lifetime

Recipient	Date	Amount or Asset	Tax Year in which the Gift was Made



Miscellaneous Information

Please use this section to record any miscellaneous information such as details of organisations/clubs, utilities, location of deeds, safe deposit box etc.



If you'd like more information call 01904 866139 or email hello@rochelegal.co.uk







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