IMPORTANT DOCUMENTS

My documents and where they are kept

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PARTNERS

Important documents

My documents and where they are kept

Would those close to you know where to find your key documents and other important information if they needed to? The people you care about most could face real difficulties if something happened to you, and they couldn't find your important paperwork, or didn't have details of key contacts such as your solicitor and accountant. This happens often – sometimes because someone has not paid enough attention to organising their affairs, but also because they may have hidden their paperwork away too well.

Trying to track down important paperwork and decipher it can be extremely challenging for those dealing with your affairs. It often results in unnecessary stress, but can also have far more significant consequences if your assets go undetected. In the UK there are billions of pounds of unclaimed financial assets, for example, with life insurance companies or in bank accounts. Without the correct paperwork, it is almost impossible to reunite these assets with their rightful owners. Another consequence is that those close to you may have to wait longer to receive their inheritance if the executors of your Will are left searching for paperwork when you die.

A helpful log

To help you keep track of key documents and other important information, we have created a helpful log. It won't take long to fill in, but could make all the difference to the people you have chosen to handle your affairs. When you have completed it, keep this document somewhere safe and remember to tell someone you trust where it is, so they can find it when they need to.

The power of good advice

Life is full of decisions and choices that shape our future. Making great decisions requires as much certainty as possible – the kind of certainty that comes from good advice. Our advice is backed by almost 200 years' experience in helping people and businesses flourish.

At Evelyn Partners our mission is 'to place the power of good advice into more hands'. We believe that more people and businesses should have access to good advice, regardless of their size or wealth. We are committed to raising the standards of good advice and to extending its reach.

We are the UK's leading integrated wealth management and professional services group. We look after the combined wealth and tax needs of our clients and provide specialist accountancy, assurance, tax and advisory services for businesses. Our clients range from online investors to those requiring bespoke wealth management, and from charities to entrepreneurs and corporate businesses.

All our advice is delivered by people who care, who go further to understand your needs so they can help you make those big decisions with ease and confidence, bringing *you* closer to what matters *most to you*.

That's the power of good advice.

My details

Name	
Date of birth __ __ / __ __ / __ __ __ __	National Insurance Number __ __ __ __ __ __ __ __ __
Tax reference	

My key contacts

Evelyn Partner contact name
Address

Solicitor name
Address

Tax office
Address

Employer
Address

Others
Address

Others
Address

Others
Address

My Will

Where you can find the original of my Will	
My Will is dated	It was drawn up by
My Executors are	
Their contact details are	

My key personal documents

Document	Reference	Where it can be found
Passport		
Driving licence		
Birth certificate		
Marriage certificate		
Divorce documents		
Deed Poll		

My Powers of Attorney

Type(s)
Date(s) registered
Name(s) and contact details of attorney(s)

My long-term care plan

Long-term care annuity in place?	◯ Yes	◯ No
Company		
Plan number		
Contact details		
If there is no annuity in place, my long-term care will be funded from the following sources:		

My funeral arrangements

Pre-paid funeral plan in place?	◯ Yes	◯ No
Company		
Plan number		
Contact details		
My funeral arrangement requests		

My bank/building society accounts

Bank/building society name		
Address of branch		
Sort code	Account no.	Account holder(s)
Contact details		

Bank/building society name		
Address of branch		
Sort code	Account no.	Account holder(s)
Contact details		

Bank/building society name		
Address of branch		
Sort code	Account no.	Account holder(s)
Contact details		

My credit cards

Credit card company	
Account no.	Account holder(s)
Contact details	

Credit card company	
Account no.	Account holder(s)
Contact details	

Credit card company	
Account no.	Account holder(s)
Contact details	

My loans

Company	
Type of loan	Account no.
Account holder(s)	
Contact details	

Company	
Type of loan	Account no.
Account holder(s)	
Contact details	

Company	
Type of loan	Account no.
Account holder(s)	
Contact details	

My assets

Investment bonds/unit trusts	
Investment details	
Account no./plan no.	Account holder(s)
Contact details	

ISA/PEP
Investment details
Account no./plan no.
Contact details

Savings and life assurance plan	
Investment details	
Account no./plan no.	Account holder(s)
Contact details	

Stocks and shares	
Investment details	
Account no./plan no.	Account holder(s)
Contact details	

Other assets (e.g. National Savings)	
Investment details	
Account no./plan no.	Account holder(s)
Contact details	

Notes

My pension

Provider (name and address)	
Latest plan value	Plan no.
Name of nominated death beneficiary	
Telephone number	

Provider (name and address)	
Latest plan value	Plan no.
Name of nominated death beneficiary	
Telephone number	

Provider (name and address)	
Latest plan value	Plan no.
Name of nominated death beneficiary	
Telephone number	

Provider (name and address)	
Latest plan value	Plan no.
Name of nominated death beneficiary	
Telephone number	

Notes

My property

Main residence address	
Approximate value	Ownership
Outstanding loan	Mortgage company

Other property address	
Property type (eg holiday home, investment property)	
Approximate value	Ownership
Outstanding loan	Mortgage company

Other property address	
Property type (eg holiday home, investment property)	
Approximate value	Ownership
Outstanding loan	Mortgage company

Other property address	
Property type (eg holiday home, investment property)	
Approximate value	Ownership
Outstanding loan	Mortgage company

Notes

Gifts made during my lifetime

Date	Amount and/or asset	Recipient

My beneficiary contact details

Name
Address
Telephone number

Name
Address
Telephone number

Name
Address
Telephone number

Name
Address
Telephone number

Speak to an expert

Evelyn Partners can help you achieve your financial goals. Book an initial, no-obligation consultation by visiting **www.evelyn.com/request-an-appointment** or calling **020 3131 5203**.

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Exp: 25/02/23