



PERSONAL ASSETS RECORD

For the Assistance of clients

FIRM DETAILS:

Logo



NB. Completing this list is NOT making a Will, nor is it instructions for a will

1. WHY COMPLETE THIS LIST?

Because your Executors/Next of Kin/Solicitor could spend many unnecessary hours trying to locate and identify possessions and essential documents after your death and completion of this list could save much time and therefore legal costs.

2. WHERE SHOULD I PUT THE LIST?

Give one copy to your solicitor and, if you wish, keep a copy in another secure place.

3. HOW OFTEN SHOULD I REVIEW SAME?

The list should be updated as your assets or personal circumstances change.

PERSONAL DETAILS

Full name and address _____

Former addresses _____

Date of birth _____

PPS number and type and location of tax office _____

Occupation _____

Residence _____

Domicile of origin _____

Particulars of any instructions as to Funeral/Grave/Arrangements _____

Date of this list _____

WILL

Date of Will _____

Location of Will _____

EXECUTORS

Names and Addresses _____

Relationship to Testator if Any _____

ENDURING POWER OF ATTORNEY

Date and Location of EPA _____

Attorneys _____

Names and Addresses _____

Relationship to Donor if Any _____

CIVIL STATUS

Married/Single /Separated/ Widow/er /Divorced / Civil Partner _____

Husband's/Wife's name _____

Date of marriage _____

Date of Spouse's death, if applicable _____

If separated or divorced, where is copy of divorce or separation agreement or order for any matters affecting rights of succession or orders affecting pension or property?

Civil partner's name and current address _____

Date of registration of the civil partnership _____

Has the civil partnership been dissolved or annulled _____

Date of dissolution or annulment of same _____

If there are any agreements in place re co-habitation, where are they stored? _____

CHILDREN

Names, ages and addresses _____

Adopted/Foster/Step-Children/Non-Marital Children _____

PARTICULARS OF ASSETS (WITH APPROX. VALUES) - AND INCLUDE LIABILITIES THEREON

HOUSE AND CONTENTS

Location of Deeds _____

Is there a Mortgage? _____

If so, is there a Mortgage Protection Policy? _____

Shares, attach list if possible - location of share certificates _____

Bank Accounts – Name and Location of Bank and Account Number _____

Credit Union - Name and Location of Bank and Account Number _____

JOINT PROPERTY/JOINT ACCOUNTS

1. Who provided the joint property, and _____

2. Who is on death to receive the entire? _____

3. The source of the joint property. _____

4. Your relationship to the other joint holder/s _____

5. In relation to personalty, how is income being dealt with at present _____

ANY OTHER PROPERTY?

DIGITAL ASSETS / RECORDS

Please take steps to ensure that your online assets (iTunes etc.) are accessible. Consider provision in relation to digital assets.

INSURANCE

Life Assurance _____

Location of Policy Documents _____

Any nominated Accounts/policies _____

ADVISORS

Accountant _____

Solicitor _____

Stock Broker _____

Insurance Broker _____

OTHER INFORMATION

