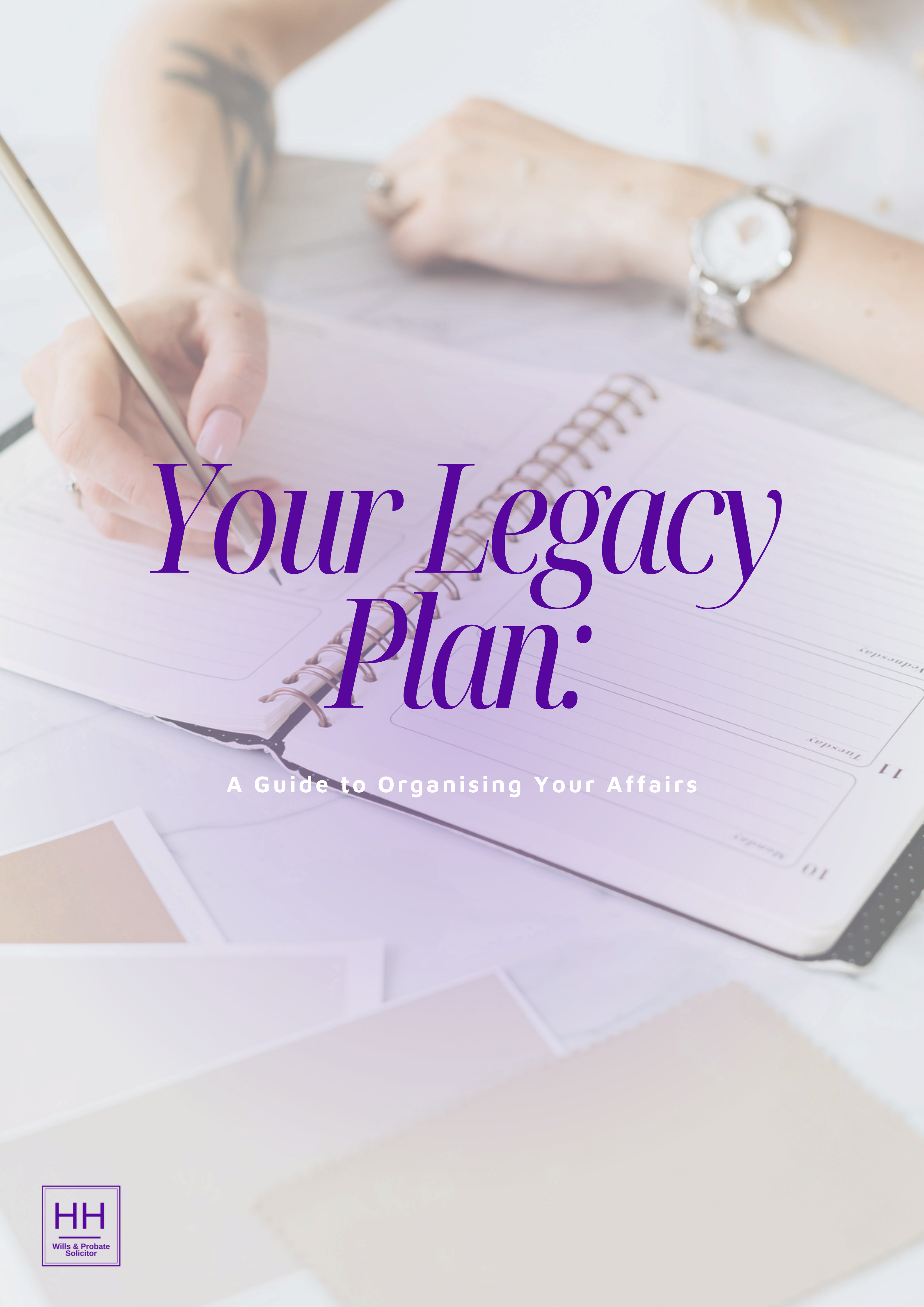


Your Legacy Plan:

A Guide to Organising Your Affairs

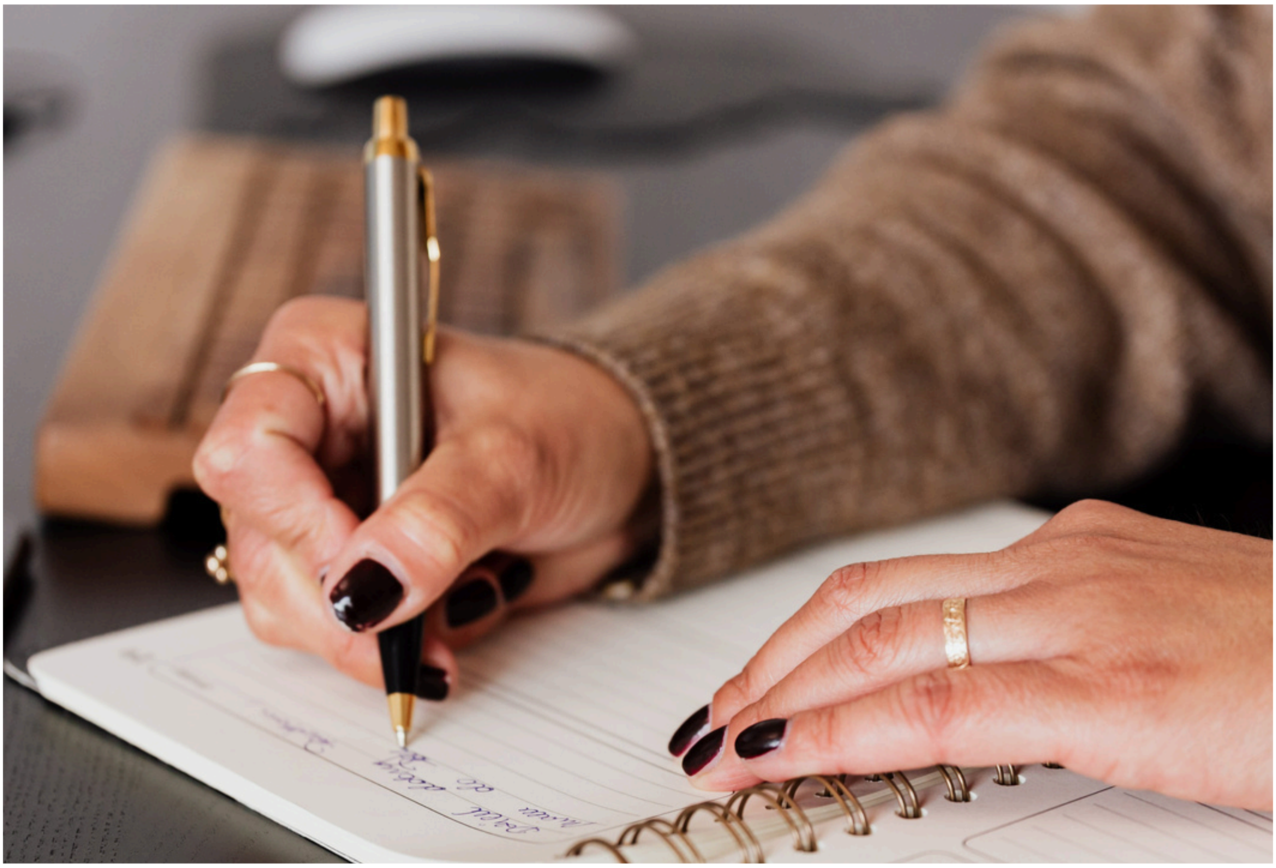
HH
Wills & Probate Solicitor

Contents

Introduction

Planning for the future is one of the kindest things you can do for your loved ones. This guide is designed to help you record essential details, from where your Will is kept to your personal wishes for the future. By filling out this resource, you'll provide clarity and comfort to your family at a difficult time.

Keep it safe, let your trusted loved ones know about it, and update it as life changes.



Disclaimer

This guide is designed to help you organise and record important details about your personal, financial, and estate planning information. However, it is not a legally binding document and does not replace a valid Will, Power of Attorney, or other legal arrangements.

For your wishes to be legally recognised, they must be documented in the appropriate legal forms, such as a Will or Lasting Power of Attorney, prepared and executed in accordance with UK law. Filling out this guide does not grant legal authority to individuals listed, such as executors or attorneys, unless they are formally appointed in legal documents.

Key Points to Keep in Mind:

- Ensure that the information recorded in this guide aligns with your legally binding documents to avoid confusion or disputes.
- This guide should not include sensitive security details, such as bank account numbers, PINs, or passwords, to protect your personal and financial information.
- If you wish to update or create legally binding documents, I am here to help. Seeking professional advice ensures that your plans are correctly formalised and provide peace of mind for you and your loved ones.

Keep this guide in a safe place, and let your trusted executors, attorneys, or family members know where to find it. Regularly review the information to ensure it remains accurate and up-to-date.

Dementia Friends
An Alzheimer's Society initiative

SFE
SOLICITORS FOR THE ELDERLY
ACCREDITED

STEP
ADVISING FAMILIES ACROSS GENERATIONS

01 Personal Details

This section is where you record essential personal information, such as your name, address, and date of birth. It ensures your loved ones and executors can quickly access key details when needed.

Full Name:

Date Of Birth:

National Insurance Number:

Address (Current and any previous ones that might be relevant):

01 Personal Details

Phone Number:

Email Address:

Occupation:

Emergency Contact Details:

Full Name:

Relationship:

Phone Number:

Full Name:

Relationship:

Phone Number:

02 Location of My Will

03 Executors and Key Contacts

Your executors are the people you trust to carry out your wishes and manage your estate when you pass away. They are responsible for ensuring your assets are distributed according to your Will, settling any debts, and handling legal and financial matters. Use this section to list their details, including any backup executors, so that everything is clear and accessible. Including specific instructions or notes can help guide them and make their role easier during a challenging time.

Full Name: ______________________________

Relationship to You: ______________________________

Phone Number: ______________________________

Email Address: ______________________________

Address: ______________________________

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Full Name: ______________________________

Relationship to You: ______________________________

Phone Number: ______________________________

Email Address: ______________________________

Address: ______________________________

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Please Note

The information you provide in this guide is not legally binding and does not replace a properly drafted and executed Will. Executors must be officially named in your Will to have the legal authority to administer your estate. Ensure this guide aligns with the details in your Will to avoid any confusion for your loved ones.

If you are unsure who is named as your executor or need to make changes to your Will, please seek professional legal advice

Key Contacts

This section is for listing the details of important people and organisations involved in your financial, legal, and personal matters. Having these contacts in one place ensures your executors or loved ones can quickly and easily access the support they need when managing your affairs.

From your solicitor to your financial adviser and even trusted friends, recording their information here helps avoid delays and confusion during a potentially stressful time.

Solicitor Information:

Full Name:

Phone Number:

Email Address:

Address:

Financial Adviser Information:

Full Name:

Phone Number:

Email Address:

Address:

Accountant:

Full Name:

Phone Number:

Email Address:

Address:

Medical Professional:

Full Name:

Phone Number:

Email Address:

Address:

04 Funeral Plan

Planning your funeral in advance can provide peace of mind and ease the burden on your loved ones. This section is a place to note where any plans or documents are stored, or to record your preferences for your funeral.

Disclaimer: While you can use this section to outline your funeral wishes, these are not legally binding. To ensure your preferences are officially recognised, they should be included in your Will or communicated directly to your executors or family. If you'd like to update your Will, I'm here to help.

Do you have a funeral plan?

If yes, who is it with?

General Wishes:

05 Financial Overview

This section is designed to help you keep track of your financial arrangements, ensuring your loved ones and executors can locate key information when needed. Use it to list details of your accounts, insurance policies, and other financial assets.

Please do not include sensitive information such as PIN numbers, passwords, or security codes.

Bank Accounts:

Bank Name:

Type of Account:

Account Holder:

Documents Location:

Bank Name:

Type of Account:

Account Holder:

Documents Location:

Bank Name:

Type of Account:

Account Holder:

Documents Location:

Bank Name:

Type of Account:

Account Holder:

Documents Location:

Insurance Policies

Your insurance policies are an important part of your financial and estate planning. Providing an overview of these policies ensures that your executors or loved ones can easily access the information they need when managing your affairs. Please remember not to include sensitive information such as PINs or passwords here. Ensure that policy documents are stored safely and can be easily located.

Insurance Policies:

Type of Policy:

Policy Number:

Provider/Company Name:

Location of Policy Documents:

Type of Policy:

Policy Number:

Provider/Company Name:

Location of Policy Documents:

Type of Policy:

Policy Number:

Provider/Company Name:

Location of Policy Documents:

Type of Policy:

Policy Number:

Provider/Company Name:

Location of Policy Documents:

Type of Policy:

Policy Number:

Provider/Company Name:

Location of Policy Documents:

Please Note

If you have named beneficiaries for any of these policies, please ensure they are up to date and align with your Will or estate plan. Contact your provider if any changes are needed. If you're unsure about how these align with your estate plan or need further assistance, I'm here to help.

Pensions, Investments, Debts/Liabilities, and Property Overview

Record the details of your pensions to help ensure they are easily located and managed.

Pension Details:

Type of Policy:

Policy Number:

Provider/Company Name:

Location of Policy Documents:

Type of Policy:

Policy Number:

Provider/Company Name:

Location of Policy Documents:

Type of Policy:

Policy Number:

Provider/Company Name:

Location of Policy Documents:

Type of Policy:

Policy Number:

Provider/Company Name:

Location of Policy Documents:

Type of Policy:

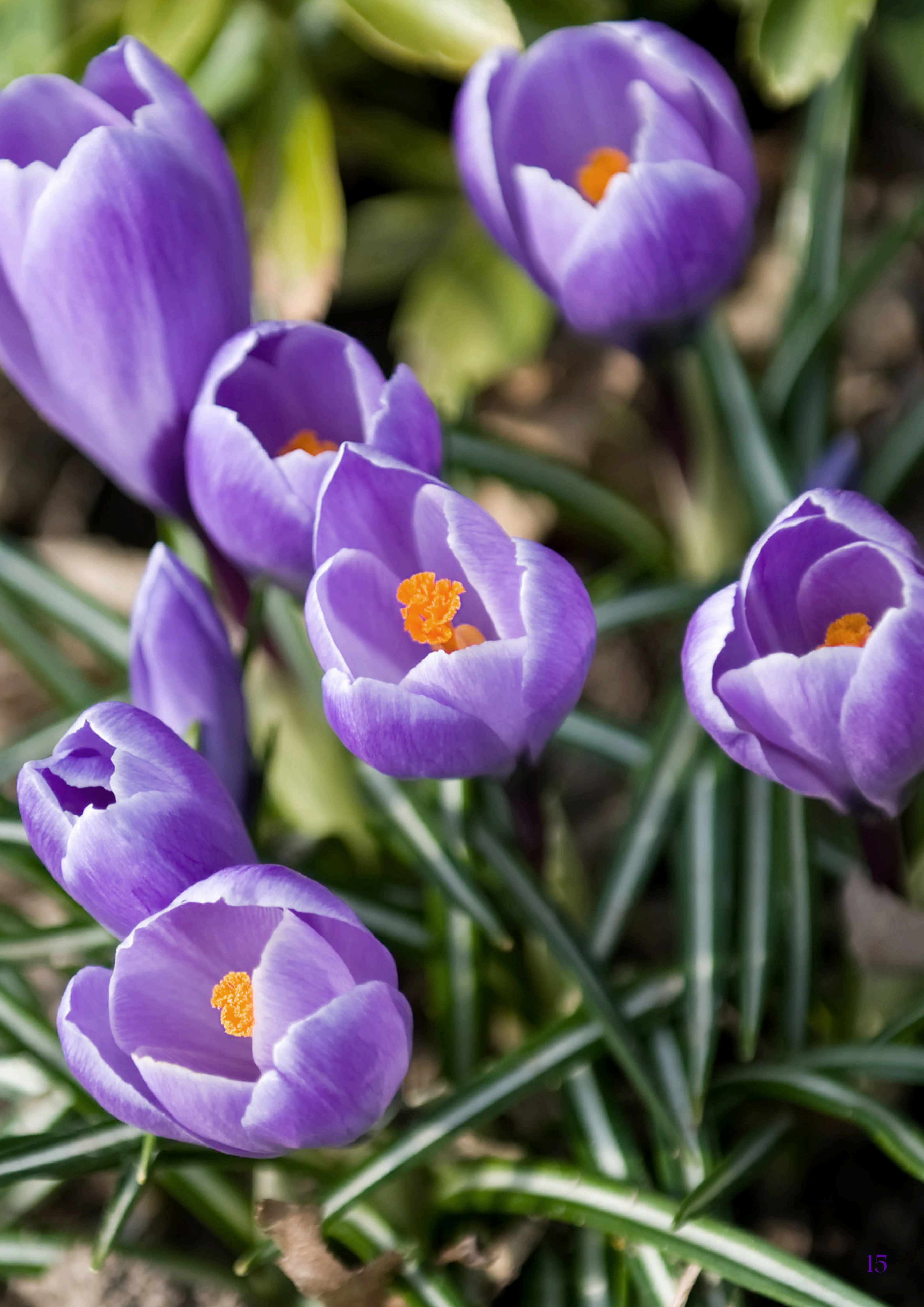
Policy Number:

Provider/Company Name:

Location of Policy Documents:

Please Note

If you have named beneficiaries for any of these policies, please ensure they are up to date and align with your Will or estate plan. Contact your provider if any changes are needed. If you're unsure about how these align with your estate plan or need further assistance, I'm here to help.



06 Sentimental Possessions

Not everything of value is financial - some of our most treasured belongings hold emotional significance. From family heirlooms to personal keepsakes, these items often carry stories, memories, and meaning that deserve to be honoured.

Use this section to record sentimental possessions that you'd like to pass down to loved ones, ensuring they go to the right people. Whether it's a piece of jewellery, a handwritten letter, or a special piece of furniture, noting your wishes here can help your family understand what matters most to you.

07 Messages for Loved Ones

08 Emergency Pet Care