



ASSET HANDBOOK

Guidance for my Executors



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Introduction

Thinking about the future can be difficult, but taking the time to organise your affairs now is a thoughtful way to help your loved ones when they need it most. This handbook is designed to make things easier by providing a convenient place to jot down details of your assets, important contacts, and any other key information your executors will need.

By completing our asset handbook, you provide a guide for your executors, ensuring that nothing important is missed. You'll be helping to protect your estate by giving your executors the confidence that they're carrying out your wishes exactly as you intended.

Once you've completed this handbook, it's important to keep it somewhere safe and secure. It would be wise to make copies and keep them with important documents, such as your Will. It's equally important to make sure your executors know where to find it when the time comes - this way, they'll have everything they need, exactly when they need it.

Important!

This handbook is not legally binding, nor is it a substitute for a professionally drafted Will. It only serves to assist your executors.

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MY ASSET HANDBOOK

Signed:

About Me

Full name: _____

Nicknames: _____

Address: _____

Date of birth: _____

National insurance number: _____

My Will

Location: _____

Contact details: _____

Reference number: _____

Important documents stored with my Will:

LPA Trust Letter of wishes

Pre-paid Funeral plan Pension/Life insurance

Other: _____

Next of Kin

Full name: _____

Contact number: _____

Address: _____

Relation: _____

Marital Status

Marital status: Single Married/Civil-partnership

Divorced Living with partner

Other: _____

Full name: _____

Contact number: _____

Address: _____

Children & Grandchildren

Full name: _____

Date of birth: _____

Contact number: _____

Address: _____

Full name: _____

Date of birth: _____

Contact number: _____

Address: _____

Full name: _____

Date of birth: _____

Contact number: _____

Address: _____

Children & Grandchildren

Full name: _____

Date of birth: _____

Contact number: _____

Address: _____

Full name: _____

Date of birth: _____

Contact number: _____

Address: _____

Full name: _____

Date of birth: _____

Contact number: _____

Address: _____

Children & Grandchildren

Full name: _____

Date of birth: _____

Contact number: _____

Address: _____

Full name: _____

Date of birth: _____

Contact number: _____

Address: _____

Full name: _____

Date of birth: _____

Contact number: _____

Address: _____

Other Family

Full name: _____

Relation: _____

Contact number: _____

Address: _____

Full name: _____

Relation: _____

Contact number: _____

Address: _____

Full name: _____

Relation: _____

Contact number: _____

Address: _____

Other Family

Full name: _____

Relation: _____

Contact number: _____

Address: _____

Full name: _____

Relation: _____

Contact number: _____

Address: _____

Full name: _____

Relation: _____

Contact number: _____

Address: _____

Friends

Full name: _____

Contact number: _____

Address: _____

Full name: _____

Contact number: _____

Address: _____

Full name: _____

Contact number: _____

Address: _____

Full name: _____

Contact number: _____

Address: _____

Friends

Full name: _____

Contact number: _____

Address: _____

Full name: _____

Contact number: _____

Address: _____

Full name: _____

Contact number: _____

Address: _____

Full name: _____

Contact number: _____

Address: _____

Important Contacts

Doctor/GP Details

Name: _____

Contact number: _____

Address: _____

Financial Advisor Details

Name: _____

Contact number: _____

Address: _____

Law Firm/Solicitor Details

Name: _____

Contact number: _____

Address: _____

Important Contacts

Accountant Details

Name: _____

Contact number: _____

Address: _____

Other: _____

Funeral Wishes

Pre-paid Funeral plan: Yes No

Policy number: _____

Provider: _____

Funeral wishes: Buried Cremated

Other: _____

Other details: _____

Property

Main Property

Address: _____

Ownership: Sole Joint Tenants-in-common

Mortgage: Yes No

Mortgage provider: _____

Other Property

Address: _____

Ownership: Sole Joint Tenants-in-common

Mortgage: Yes No

Mortgage provider: _____

Buy-to-let: Yes No

Property

Other Property

Address: _____

Ownership: Sole Joint Tenants-in-common

Mortgage: Yes No

Mortgage provider: _____

Buy-to-let: Yes No

Other Property

Address: _____

Ownership: Sole Joint Tenants-in-common

Mortgage: Yes No

Mortgage provider: _____

Buy-to-let: Yes No

Property

Bank Accounts

Provider: _____

Account number: _____

Ownership: Sole Joint

Account type: Current Savings ISA

Other: _____

Provider: _____

Account number: _____

Ownership: Sole Joint

Account type: Current Savings ISA

Other: _____

Provider: _____

Account number: _____

Ownership: Sole Joint

Account type: Current Savings ISA

Other: _____

Bank Accounts

Provider: _____

Account number: _____

Ownership: Sole Joint

Account type: Current Savings ISA

Other: _____

Provider: _____

Account number: _____

Ownership: Sole Joint

Account type: Current Savings ISA

Other: _____

Provider: _____

Account number: _____

Ownership: Sole Joint

Account type: Current Savings ISA

Other: _____

Bank Accounts

Investments

Debts & Liabilities

Provider: _____

Account number: _____

Account type: Credit Loan Finance
 Other: _____

Provider: _____

Account number: _____

Account type: Credit Loan Finance
 Other: _____

Provider: _____

Account number: _____

Account type: Credit Loan Finance
 Other: _____

Provider: _____

Account number: _____

Account type: Credit Loan Finance
 Other: _____

Debts & Liabilities

Insurance & Pension Policies

Life Insurance

Provider: _____

Policy number: _____

Contact details: _____

Provider: _____

Policy number: _____

Contact details: _____

Pension

Provider: _____

Policy number: _____

Contact details: _____

Insurance & Pension Policies

Provider: _____

Policy number: _____

Contact details: _____

Home Insurance

Provider: _____

Policy number: _____

Contact details: _____

Car Insurance

Provider: _____

Policy number: _____

Contact details: _____

Insurance & Pension Policies

Private Health Insurance

Provider: _____

Policy number: _____

Contact details: _____

Pet Insurance

Provider: _____

Policy number: _____

Contact details: _____

Other: _____

Vehicles

Make & model: _____

Registration: _____

Ownership documents location: _____

Make & model: _____

Registration: _____

Ownership document location: _____

Other: _____

Vehicles

Make & model: _____

Registration: _____

Ownership documents location: _____

Make & model: _____

Registration: _____

Ownership document location: _____

Other: _____

Important Document Locations

Birth certificate: _____

Marriage certificate: _____

Divorce papers: _____

Trusts: _____

Lasting Powers of Attorney: _____

Other: _____

Other Wishes & Requests

Other Wishes & Requests

Other Wishes & Requests

Extra Notes

Extra Notes

Extra Notes

ELM Legal Services

Losing a loved one can be overwhelming, but you don't have to go through it alone. Our team is ready to support you through every step of the estate administration process.

Whether you need full support or just assistance with applying for a grant of probate, we're here to help.



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