

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	er:	
Address:		
Relation:		
	Marita	al Status
Marital status:	□ Single	☐ Married/Civil-partnership
	☐ Divorced	d Living with partner
	□ Other: _	
Full name:		
Contact number:		
Address:		

Children & Grandchildren

Full name:
Date of birth:
Contact number:
Address:
е п
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

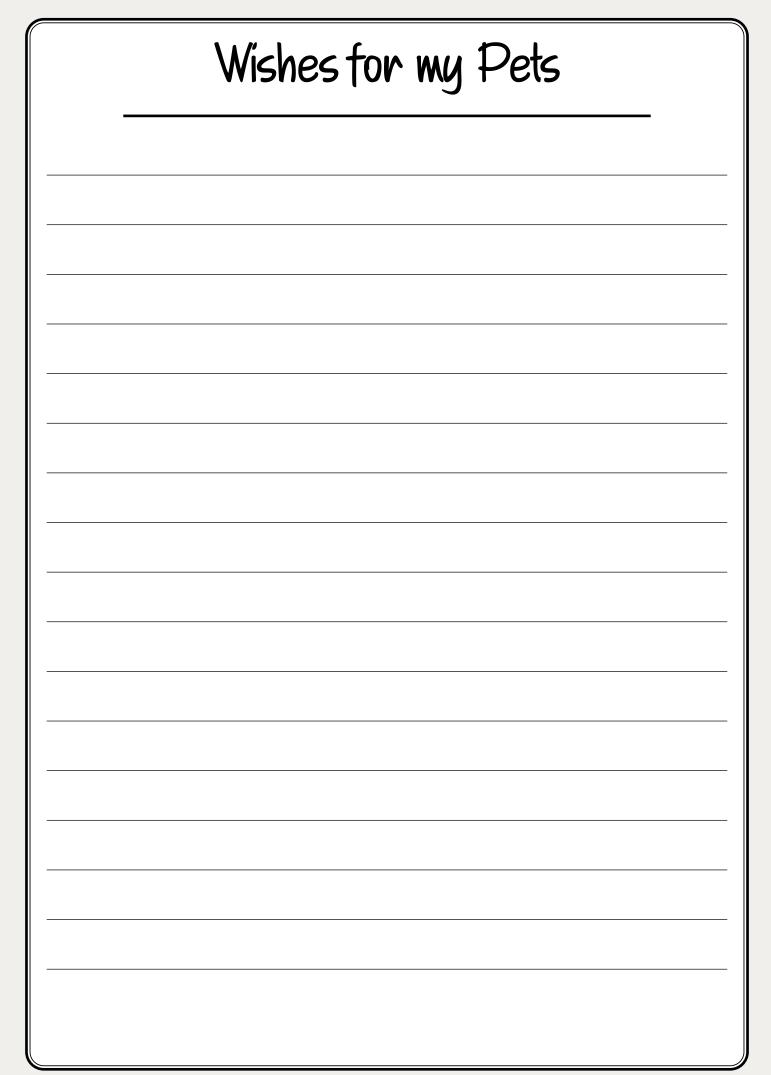
Full name:
Date of birth:
Contact number:
Address:
Full name:
Date of birth:
Contact number:
Address:
Full name:
Date of birth:
Contact number:
Address:

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

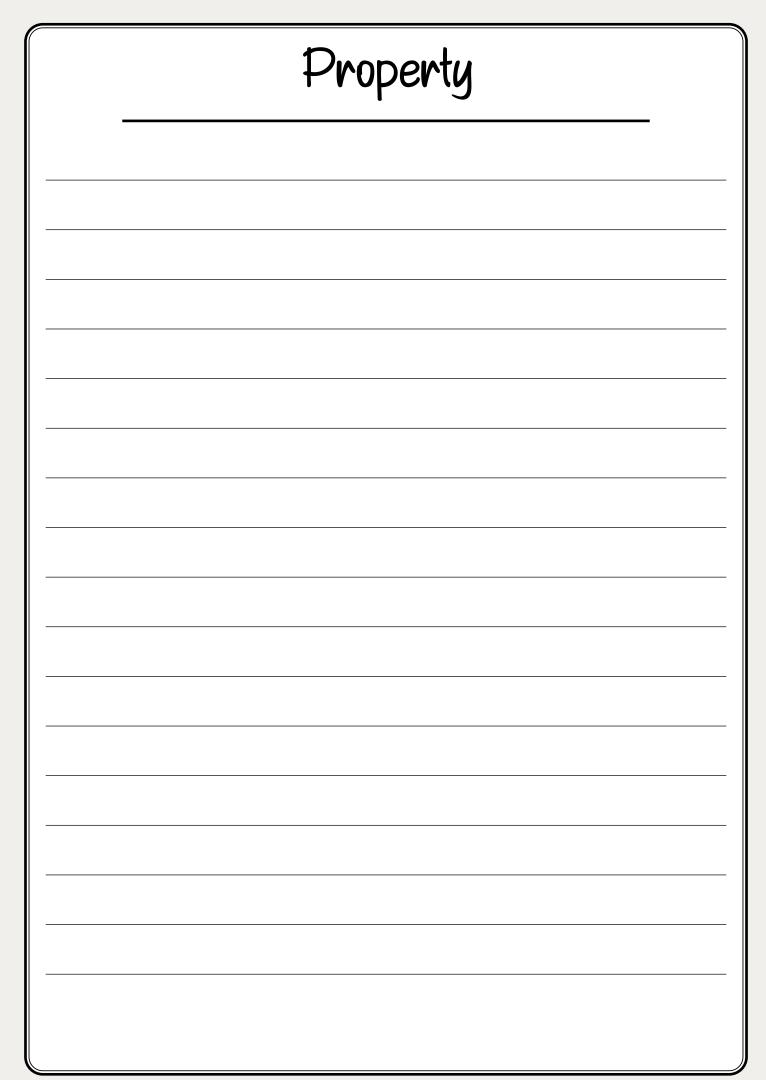
Pre-paid Funeral plan: ☐ Yes ☐ No
Policy number:
Provider:
Funeral wishes: Buried Cremated
□ Other:
Other details:

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	

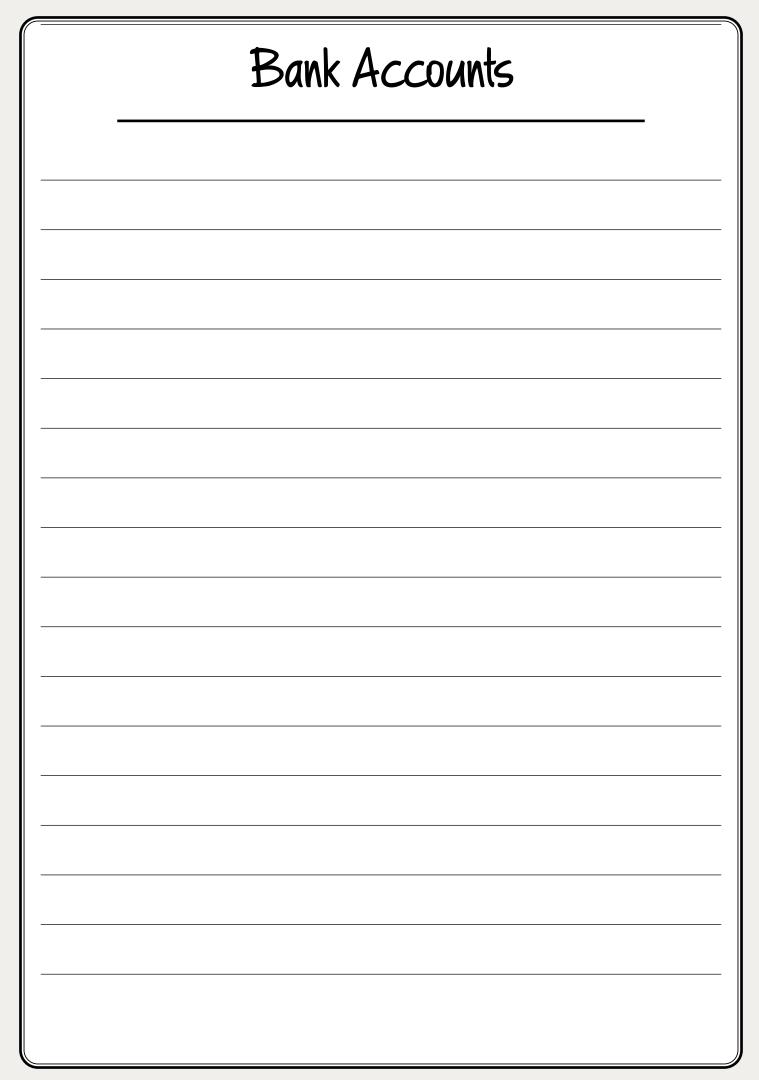


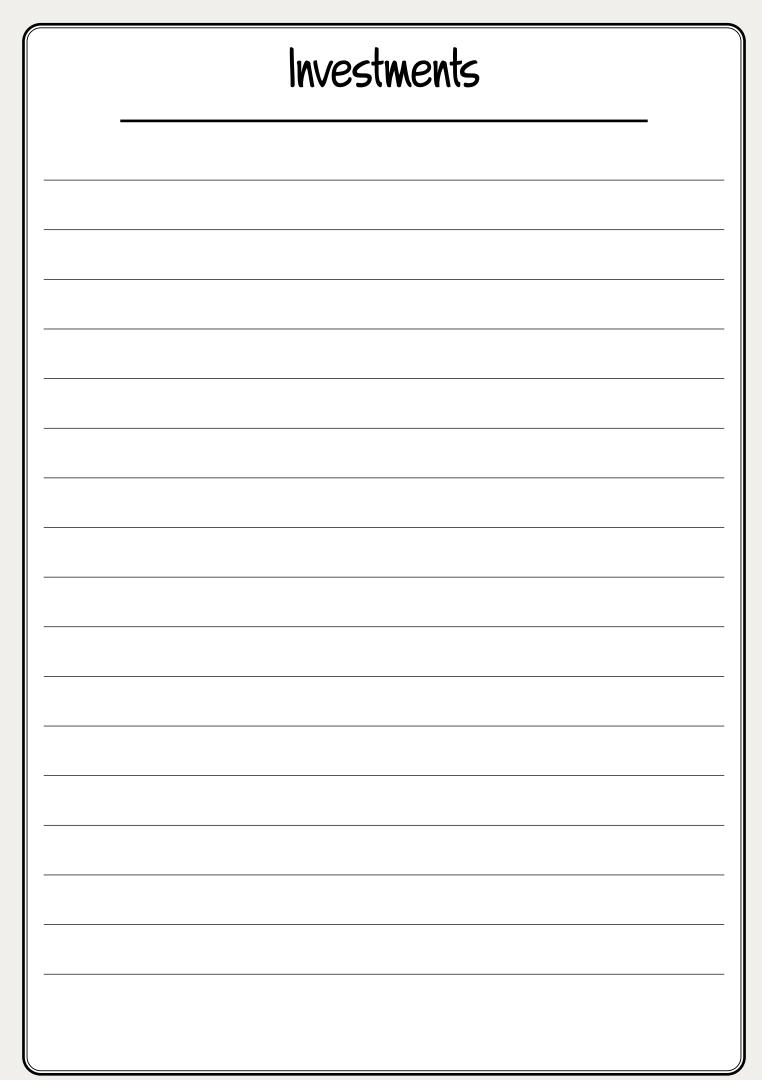
Bank Accounts

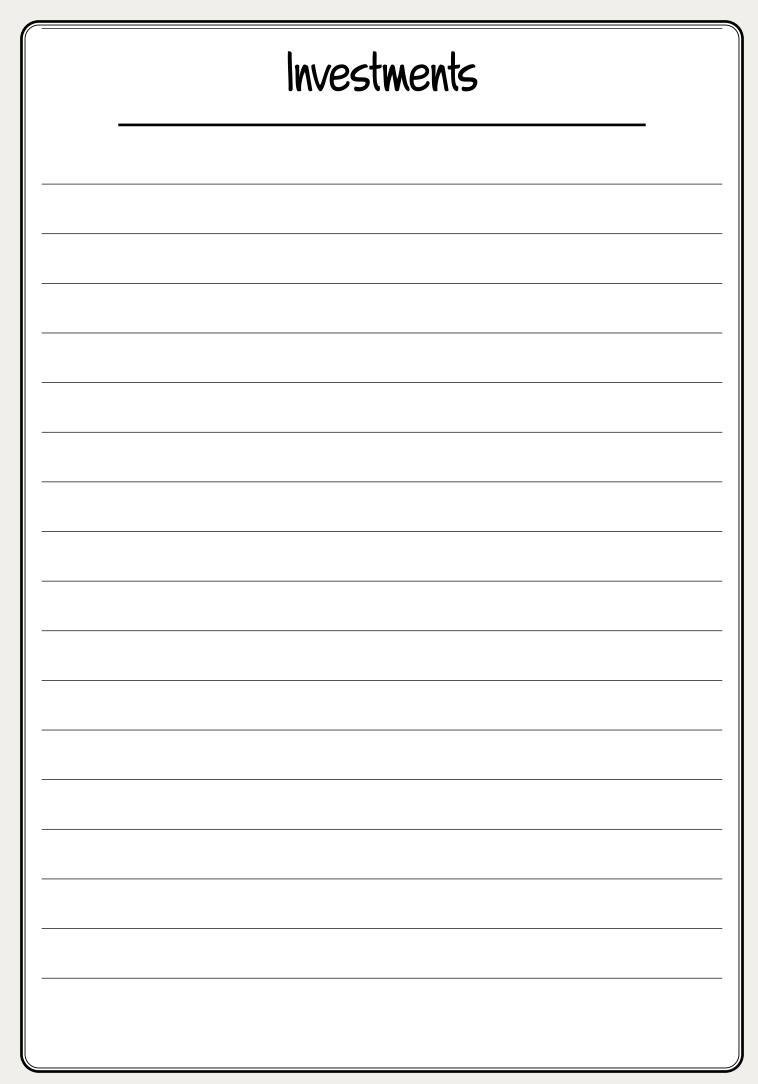
Provider:			
Account number	er:		
Ownership: 🗆 S	Sole 🛮 Joint	•	
Account type:	☐ Current	□ Savings	□ ISA
	□ Other: _		
Provider:			
Account number	er:		
Ownership: 🗆 S	Sole 🛮 Joint	+	
Account type:	☐ Current	□ Savings	□ ISA
	□ Other: _		
Provider:			
Account number	er:		
Ownership: 🗆 S	Sole 🛮 Joint	†	
Account type:		□ Savings	

Bank Accounts

Provider:			
Account number	er:		
Ownership: 🗆 S	Sole 🗖 Joint	+	
Account type:	☐ Current	□ Savings	□ ISA
	□ Other: _		
Provider:			
Account number	er:		
Ownership: 🗆 S	Sole 🗖 Joint	+	
Account type:	☐ Current	□ Savings	□ ISA
	□ Other: _		
Provider:			
Account number	er:		
Ownership: 🗆 S	Sole 🛮 Joint	t	
Account type:		□ Savings	
Account number Ownership:	er: Sole 🛭 Joint 🗖 Current	d Savings	□ISA

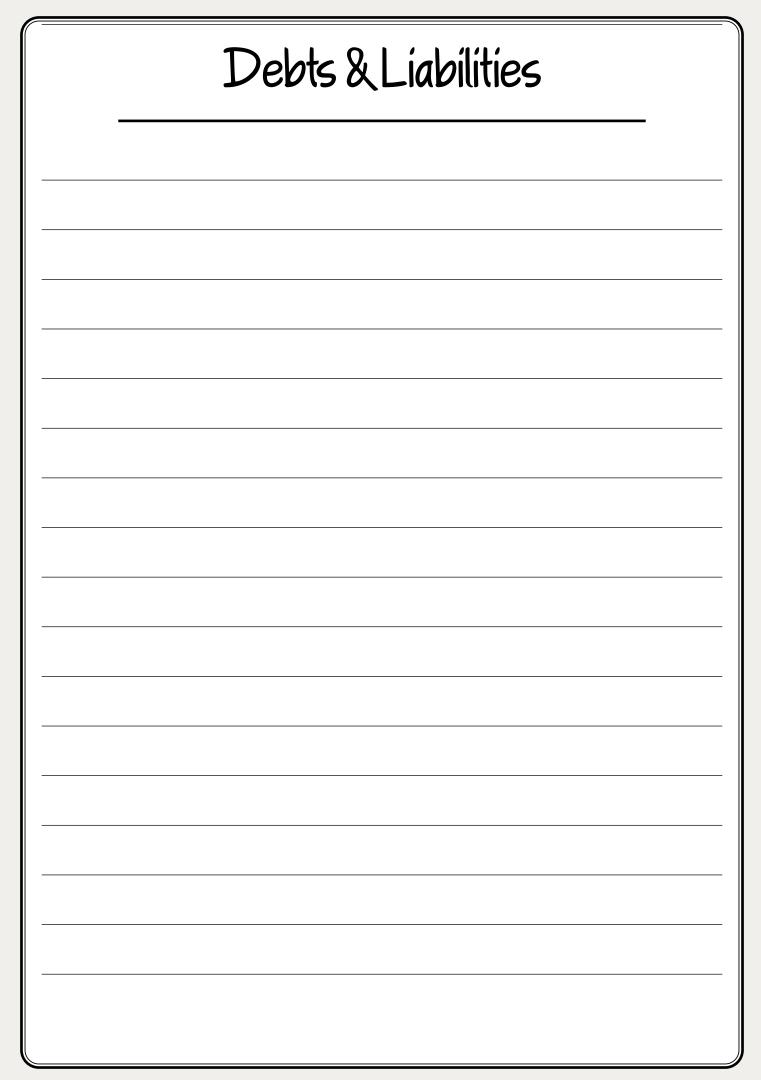






Debts & Liabilities

Provider:			
Account number	er:		
Account type:	☐ Credit	☐ Loan	☐ Finance
	□ Other: _		
Provider:			
Account type:	□ Credit	□ Loan	☐ Finance
	□ Other: _		
Provider:			
Account number	er:		
Account type:	□ Credit	□ Loan	☐ Finance
	□ Other: _		
Provider:			
Account type:	☐ Credit	□ Loan	



Insurance & Pension Policies

Life Insurance
Provider:
Policy number:
Contact details:
Duran dalla m
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

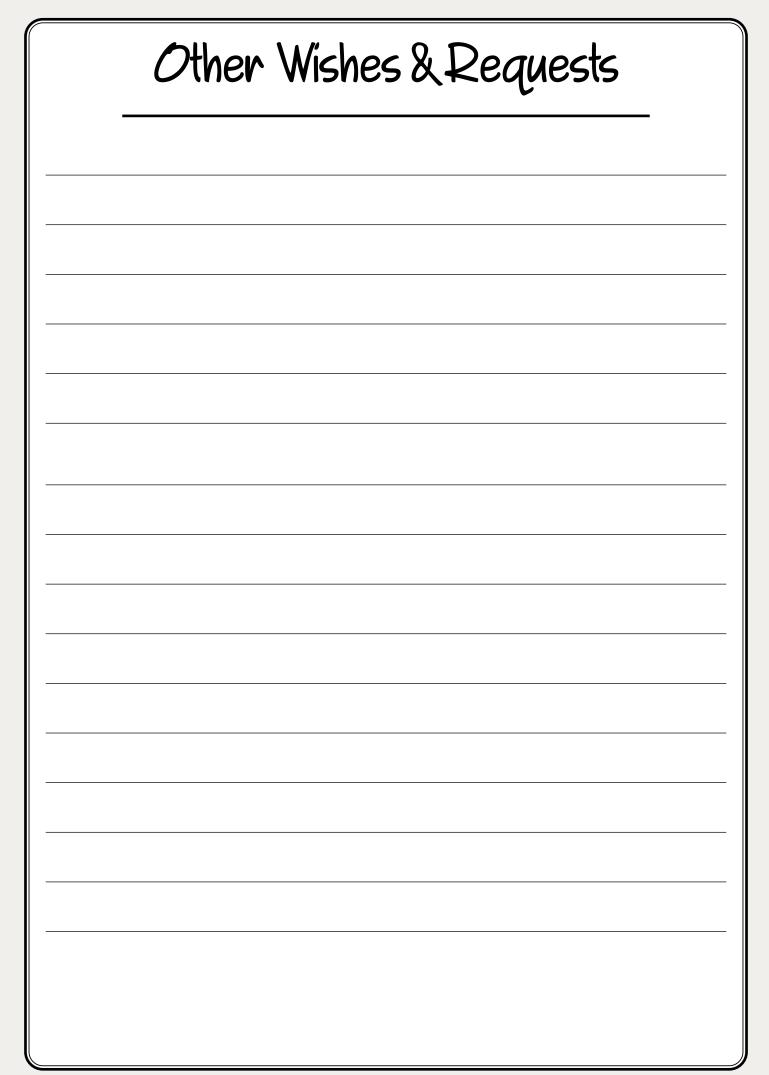
Make & model:
Registration:
Ownership documents location:
Make & model:
Registration:
Ownership document location:
Other:

Vehicles

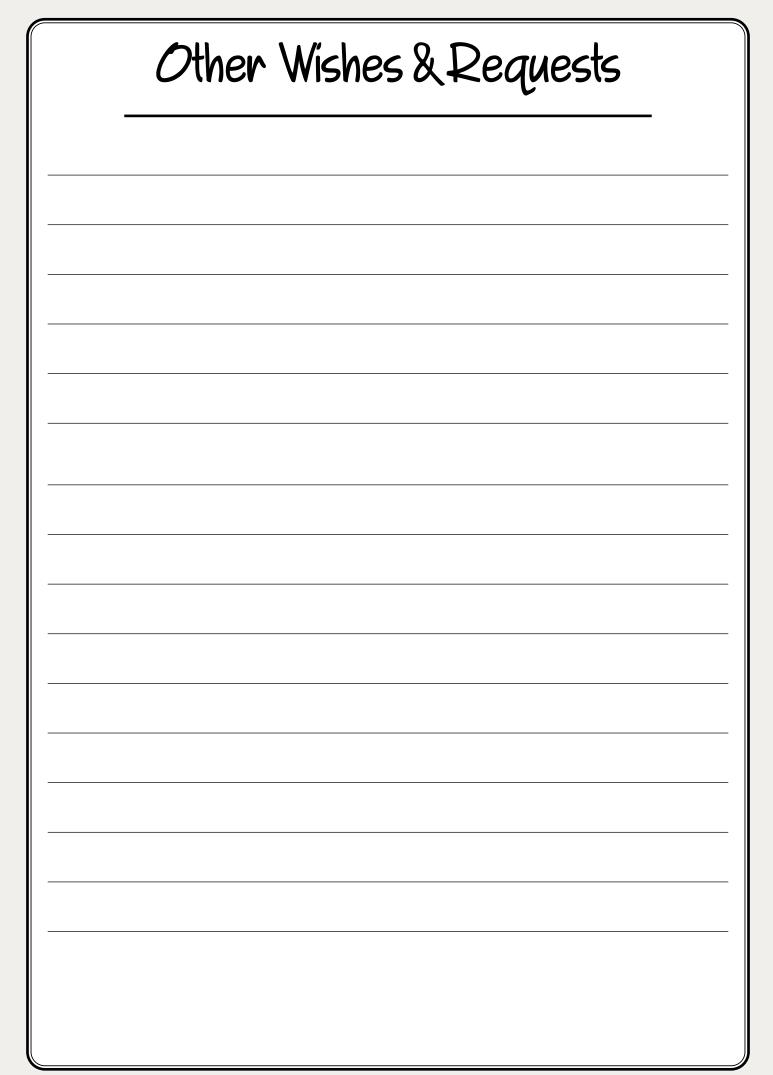
Make & model:
Registration:
Ownership documents location:
Make & model:
Registration:
Ownership document location:
Other:

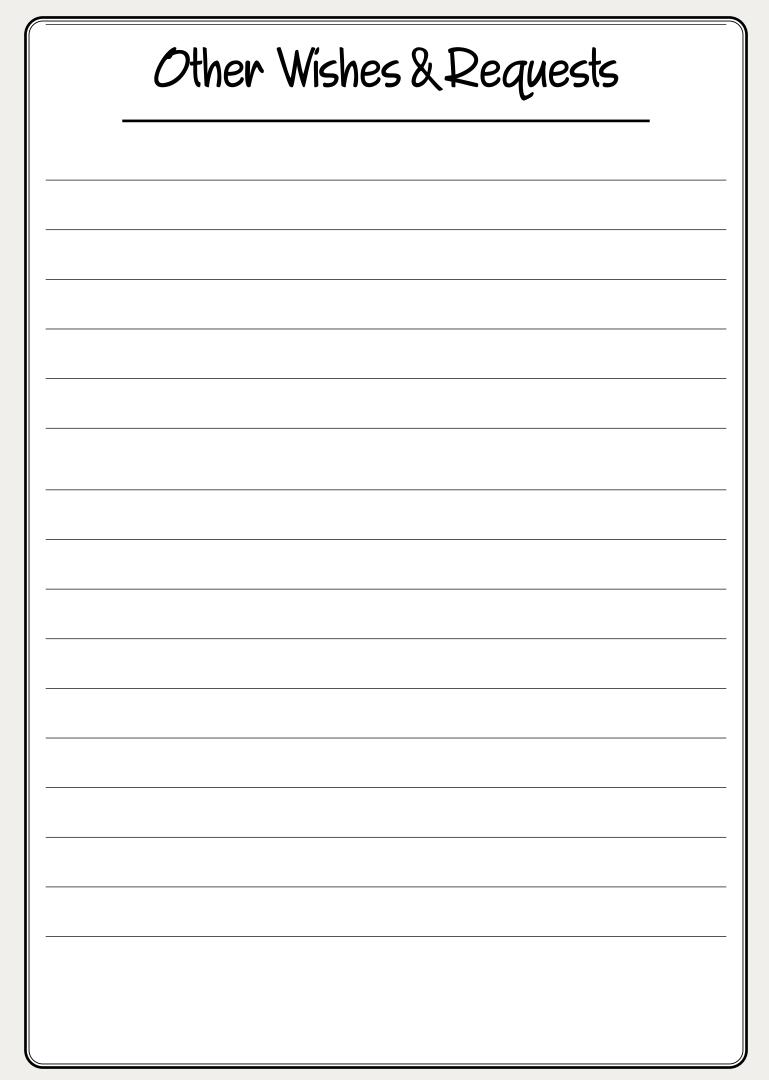
Important Document Locations

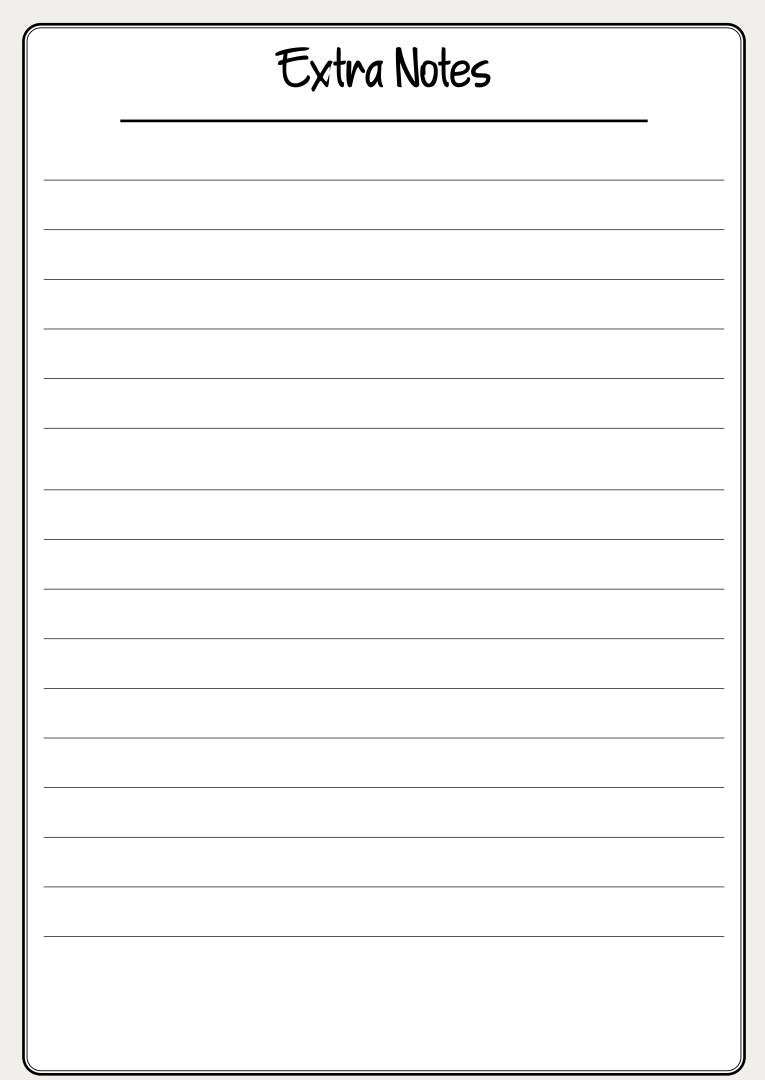
Birth certificate:
Marriage certificate:
Divorce papers:
Trusts:
Lasting Powers of Attorney:
Other:



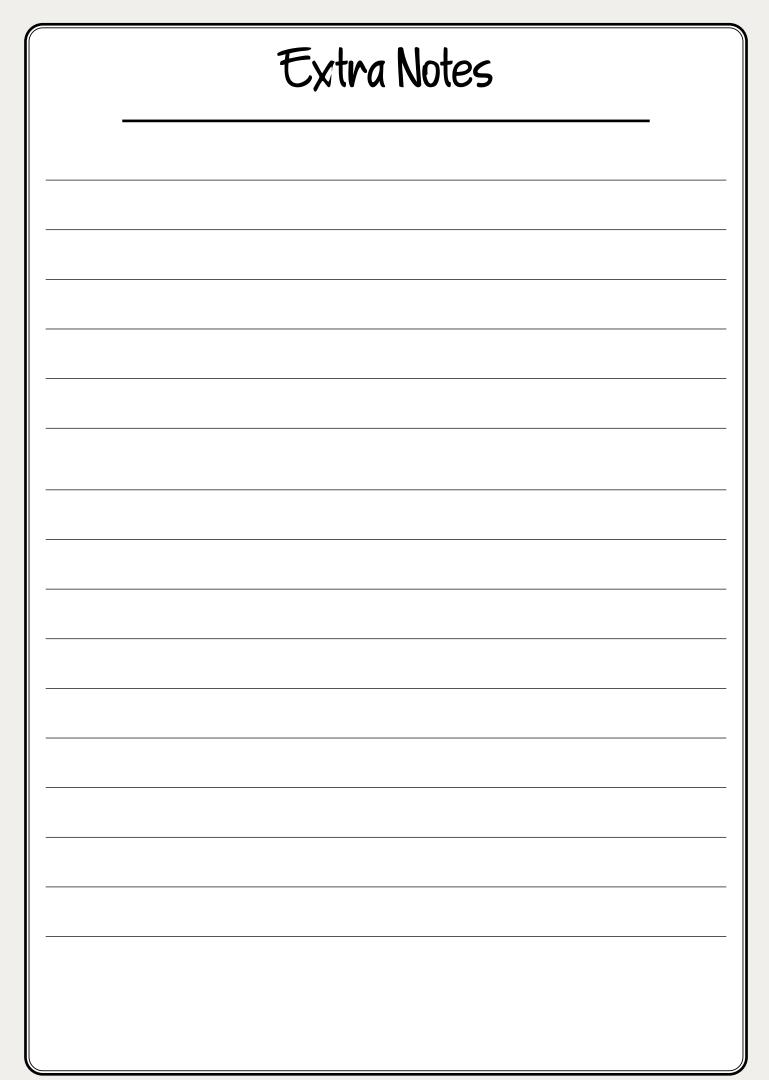












ELM Legal Services

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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