

**Important information
about you**



MORTGAGES

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This document has been designed to capture important information about you. It should make it easier for your loved ones to find everything they need should something happen to you.

1 About you

Include title, name, date of birth etc.

2 Bank details

Bank	Owner	Account Number
1		
2		
3		
4		

3

Your assets

These could be: Property and Land, Cash Deposits, Collective Investments, Individual Savings Accounts (ISAs), Investment Bonds, Open Ended Investment Companies (OEICs), Venture Capital Trusts (VCTs), Enterprise Investment Schemes (EISs), Structured Deposits, Stocks and Shares, Premium Bonds, National Savings, PEPs, Unit Trusts.

Type of Asset / Provider	Owner	Account Number
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

5 Your pensions

These could be: Personal Pensions, Stakeholder Pensions, Workplace Pensions, Unsecured Pensions, Annuities.

Type of Policy / Provider	Owner / Location of Documents	Account Number
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

6

Your protection policies

These could be: Life Assurance, Critical / Serious Illness, Income Protection Policies.

Type / Policy Provider	Owner / Location of Documents	Reference / Account Number
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

7

Gifts, trusts and settlements

Gifts made to individuals within the last 7 years. These do not need to include exempt gifts.

Date of Gift			Recipient	Amount
Day	Month	Year		

Trusts and settlements that have been created.

Settlor (Creator of Trust)	Trustees (Names, Addresses, Phone Number).	Assets held by Trusts

Trusts that have been created of which I/we have a lifetime interest.

Details

8

Your Business / Employer

Name

Address

Name and Address of Partner(s) / Co-Directors

1

2

3

4

9

Miscellaneous

This could include organisations, clubs and contracts (phone, TV, internet, utilities)

10 Key contacts

These could be: Solicitor, Accountant, Doctor, Employer, Power of Attorney, Executors of Will, Trustees etc.

Name	Type of Contact	Address	Phone Number / Email Address
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

12 Other documents

These could be the following: Will, Power of Attorney, Land Certificate / Property Title Deeds, Share Certificates, Birth Certificates, Marriage Certificate, Passports, Letter of Wishes.

Type of Document	Location of Documents	Reference Account Number
1		
2		
3		
4		
5		
6		
7		
8		

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