

You do not need to complete this form but if you do it will help your executor, or whoever will be responsible for dealing with your affairs, to ensure that nothing is overlooked. This section will contain confidential information – please ask your relative or executor to keep this form in a secure place.

1. Your Will

If you do not already have a will, we suggest that you take advice from a solicitor or other legal professional.

Where the will is kept

Date of your last will

Date of any codicils to the will

Executors' names, addresses and telephone numbers

2. Income Tax

Where your tax documents are kept

Your tax office

Tax Reference number

3. National Insurance

National Insurance number

National Health Service number

4. Bank Account(s)

Give the name and address of your bank(s) and your account number(s)

Please complete My Important Information overleaf...

5. Property

Where your house deeds, lease or tenancy agreement are kept

Mortgage details (if any)

Any other properties

6. Location of other important documents

Savings books, savings certificates and building society passbooks

Company or private pension(s)

Stocks and shares certificates

Insurance policies

Premium Bonds

Loans or hire purchase agreements

Certificates of birth, marriage, civil partnership, adoption, divorce etc.

Loans or hire purchase agreements

7. Keys

Location of your house keys, car keys etc.

8. Address book

Location of your address book for your family to contact other family and friends

9. Any other important documents