



Assets & Liabilities

IMPORTANT INFORMATION

Full Name	
Date of Birth	
National Insurance Number	
NHS Number	
Location of my Will	
Location of other important documents	
Details of Financial Adviser	
Details of Funeral Plan	

There is lots of free information and advice available at

www.TotalLegacyCare.co.uk

Or contact us directly

✉ Info@TotalLegacyCare.co.uk

or

☎ 01727 865 121

Property

Home Residence	
Second Property	
Buy-to-Let	
Additional Properties	
Property owned with others	

Bank and Building Society Accounts / Savings

Current Account	Bank: Telephone Number: Account Number: Sort Code:
Savings Account	Bank: Telephone Number: Account Number: Sort Code:
Additional Savings Account	Bank: Telephone Number: Account Number: Sort Code:
ISA	Bank: Telephone Number: Account Number: Sort Code:
Additional ISA	Bank: Telephone Number: Account Number: Sort Code:

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Building Society	Bank: Telephone Number: Account Number: Sort Code:
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Premium Bonds / NS&I Products

Premium Bonds	Account Number:
Certificates	Certificate Number:
Additional Products	

Pensions

Employer Pension Scheme	Provider: Account Number:
Employer Pension Scheme	Provider: Account Number:
Employer Pension Scheme	Provider: Account Number:
Employer Pension Scheme	Provider: Account Number:
Private Pension Scheme	Provider: Account Number:
State Pension	Provider: Account Number:

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Life Insurance Policies

Life Insurance Policy	Provider: Account Number:
Additional Policy	Provider: Account Number:

Shares and Investments

Shares	Company: Telephone Number: Additional Information:
Shares	Company: Telephone Number: Additional Information:
Shares	Company: Telephone Number: Additional Information:
Investment	
Investment	

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Employment Benefits

Salary	Date paid:
Share Incentive	
Bonus	
Death in Service	
Additional Benefits	

State Benefits

State Pension	
Benefit	Type of Benefit: Payment Date:
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Personal Items

Jewellery	
Vehicles	
Collections	
Glassware	
Silverware	
China / Porcelain	
Artwork	
Any other items	

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Creditors

Mortgage	Provider: Telephone Number: Account Number:
Loan	Provider: Telephone Number: Account Number:
Additional Loan	Provider: Telephone Number: Account Number:
Credit Card Account	Provider: Telephone Number: Account Number:
Credit Card Account	Provider: Telephone Number: Account Number:
Credit Card Account	Provider: Telephone Number: Account Number:

Amenities & Utilities

Electricity	Provider: Telephone Number: Account Number:
Gas	Provider: Telephone Number: Account Number:
Water	Provider: Telephone Number: Account Number:
Telephone (landline)	Provider: Telephone Number: Account Number:
Mobile Phone	Provider: Telephone Number: Account Number:

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Internet / Broadband	Provider: Telephone Number: Account Number:
TV	Provider: Telephone Number: Account Number:
Home & Contents Insurance	Provider: Telephone Number: Account Number:
Car Insurance	Provider: Telephone Number: Account Number:
Additional Insurances	Provider: Telephone Number: Account Number:
Regular Expenses	

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Passwords

Please include details of any passwords for online accounts such as social media accounts, emails, photograph storage accounts and cloud accounts that you may want your loved one's to access when you are unable to.

You could also include any electronic devices and their passwords/passcodes (mobile phone / tablet / computer).

Account	Password

Additional Information:

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