

Personal Assets Log

to be placed with my Will

Client Information

Full Name:

Any Former Names (i.e. maiden name, change by Deed Poll):

Address:

Place of Birth:

Funeral Instructions

It is my wish to be: *(please tick)* **Buried** **Cremated**

Further funeral instructions:

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Deeds to my house

Can be found at:

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Bank/building society accounts

Give name and address of branch

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Mortgage details

Building society/Bank:

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Account no.:

Pension/life insurance/insurance policies

Company name:

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Account no.:

Shares held (Use a separate piece of paper if necessary)

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Other property (premium bonds, saving certificates, etc.)

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HMRC

Reference no:

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National insurance no.:

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