

## Wills & Probate - Personal Assets Log

### Personal Details

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
Postcode: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Place of birth: \_\_\_\_\_

Maiden name: \_\_\_\_\_

Occupation: \_\_\_\_\_

NI Number: \_\_\_\_\_

### Holder(s) Of My Will

My solicitors are:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
Postcode: \_\_\_\_\_

Tel: \_\_\_\_\_

Email: \_\_\_\_\_

If not with my solicitors, my will may be found:

Location: \_\_\_\_\_

\_\_\_\_\_

Date of will: \_\_\_\_\_

Date of any  
codicil: \_\_\_\_\_

### Executors Of My Will

Name (1): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
Postcode: \_\_\_\_\_

Tel: \_\_\_\_\_

Name (2): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
Postcode: \_\_\_\_\_

Tel: \_\_\_\_\_

### Funeral & Burial Arrangements

Specific Details: \_\_\_\_\_

\_\_\_\_\_

I wish/ do not wish to be cremated (delete as necessary)

**My Documentation & Information**

Birth, Marriage, Adoption, Etc Certificates can be found in: \_\_\_\_\_

Primary Bank/ Building Society Account:      Branch Name: \_\_\_\_\_

Branch Address: \_\_\_\_\_

\_\_\_\_\_

Savings Account 1:      Account Name: \_\_\_\_\_

Branch Address: \_\_\_\_\_

Savings Account 2:      Account Name: \_\_\_\_\_

Branch Address: \_\_\_\_\_

Investment Account 1:      Account Name: \_\_\_\_\_

Provider: \_\_\_\_\_

Investment Account 2:      Account Name: \_\_\_\_\_

Provider: \_\_\_\_\_

Mortgage Provider:      Branch Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Deeds To My House/ Rent Book can be found in: \_\_\_\_\_

Pension Provider:      Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Life Insurance Provider:      Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Insurance Provider(s):      Company Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

Shareholding List:      Company: \_\_\_\_\_

(Use additional paper if necessary):

Company: \_\_\_\_\_

Premium Bonds:      Details: \_\_\_\_\_

Inspector Of Taxes:      Address: \_\_\_\_\_

\_\_\_\_\_

Ref. Number: \_\_\_\_\_

Enduring/ Power of Attorney documents can be found in: \_\_\_\_\_

Use a separate piece of paper for details of trusts that you may be a trustee or beneficiary of. Also, include any arrangements for pets not covered within your will.

**Finally, remember not to write on your will after signing it. If you want to make a new will, or change your present will, contact your solicitor for advice.**