

LIGHTING THE WAY FOR FUTURE GENERATIONS



ESTATE ESSENTIALS

A PERSONAL RECORD



Hello!

**We are Beacon Advice,
experts in Wills, Trusts &
Powers of Attorney.**



We understand that the death of a close family member or friend can be a stressful time for those left to handle the estate.

It can be even more difficult if key documents and information cannot easily be found.

This is why we are providing this booklet for you to make notes and keep track of all of your important information, accounts and relevant assets, making it easier for your Executors to manage your affairs after you have gone.



How this book can help

Keeping it simple

Your Executors need this information to administer your estate correctly and with confidence.

It is one of the best last gifts you can give to them, reducing guesswork and ensuring your legacy is managed as you envisioned.

This booklet is designed to streamline the process for your loved ones during a time when simplicity matters the most.

By consolidating your critical financial and personal details, you're not only organising your affairs, you're also giving your Executors a clear path to follow. It's about making a potentially complex process as straightforward as possible for them.

Keeping it organised

This booklet serves as a central record for all your important estate information.

Regularly reviewing and updating this booklet ensures that the information remains current and accurate. Life's changes, big or small, can affect your estate plans and the details your Executors will need.

Consider setting a reminder for yourself to revisit this document at least once a year or after any significant life event, such as a marriage, the birth of a child or grandchild, a new investment, or the sale of an asset. This will help ensure that no detail is overlooked.

We are here to support you in keeping your estate plan orderly and current. If you find that your estate has grown or become more complex, if your circumstances have changed, or if you simply need a fresh copy, don't hesitate to get in touch.

Finding support

Will Register Search

The National Will Register, provider of Will Registration and Will Search services in the UK, is chosen, endorsed and used by the legal profession, law firms, PI insurers, Government agencies, charities, the public and other associated sectors and organisations.

www.nationalwillsregister.co.uk

Government Services and Information

The official website of all government departments helping you to get quick and accurate information

www.gov.uk

National Association of Funeral Directors

A National Association of Funeral Directors (NAFD) member firm will guide you through the process and help you make arrangements at what can be a very upsetting time.

www.nafd.org.uk

Citizens Advice

The Citizens Advice service helps people resolve their legal, money and other problems by providing free, independent and confidential advice, and by influencing policymakers.

www.adviceguide.co.uk

The Bereavement Register

The Bereavement Register can help reduce the amount of direct mail sent to their address, stopping painful daily reminders.

www.the-bereavement-register.org.uk

My Details

First Name:

Surname:

Date of Birth:

Tax Reference:

National Insurance No:

Key Contacts

	Company Name & Address	Contact
Will Provider		
Solicitor		
Accountant		
Doctor		
Tax Office		
Employer		
Others		

My Will

Your Will is an important document. The original is crucial. If it cannot be found after you have died the default position in Law is that YOU destroyed it to render yourself intestate (dying without a Will).

The original Will is held by:

The Will is dated:

The Will was drawn up by:

Executor Contact Details

Name	Address	Tel/Email

Powers of Attorney Health Decisions/Financial Decisions

Date Made	Name & Address of Attorneys	Registered Yes/No	Names & Addresses of People to be Notified

My Beneficiary Contact Details

Name	Address	Tel/Email

Comments/Notes

Bank/Building Society Accounts Including Online Accounts

Company	Address	Sort Code	Account No.

Credit Cards

Company	Card No.	Notes

Loans

Company	Address	Account No.

My Assets

Bonds, Unit Trusts, ISAs, Stocks & Shares, etc.

Company	Type of Investment	Account No.	Contact

My Policies Life Insurance, Critical Illness, etc.

Company	Type of Investment	Account No.	Contact

Comments/Notes

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My Pensions

Company	Address	Plan No.	Contact

Comments/Notes

My Property

	Address	Value	Outstanding Mortgage
Main Residence			
Other Property			

Comments/Notes

Miscellaneous Information

Details of Subscriptions, Organisations, Clubs, Utility Companies, etc

Name	Membership/Account No	Contact Details

Comments/Notes

Gifts Made During Lifetime

Date	Amount/Asset	Recipient

Comments/Notes

My Funeral Arrangements

Please leave any instructions to your next of kin and attorneys in the box below.
If you have written your instructions in a **Letter of Wishes** please note it below.

Comments/Notes

Please use this panel to record any additional information such as requests regarding medical research bequests, deeds/safe box access etc.



**Don't leave
tomorrow to
chance, take
control today.**

WILLS • TRUSTS • LASTING POWER OF ATTORNEY

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