

## Record of Will and Important Documents

This Personal Assets Log is a record intended as a practical reminder of where a Will and related important papers are kept, and of useful people to contact in the event of a death or accident. It is not itself a legal document. The answers to the numbered questions should be filled in once you have made your Will.

### 1. Personal Details

Name

Address

Email

Telephone

### 2. Financial Advisers

Name **Financial Foresight**

Address PO BOX 2  
Downpatrick  
BT30 9JY

Telephone 028 4461 7575

[www.financialforesight.co.uk](http://www.financialforesight.co.uk)

## Details of Will

### 3. Solicitors to Act

Name

Address

Email

Telephone

### 4. Place where original Will is kept?

### 5. Is cremation requested?

### 6. Date of Will

### 7. Date of any Codicils

### 8. Executors names, addresses, telephone nos:

*(There may be 1, 2, 3 or 4 Executors)*

## **Information for Executors**

Questions 9-15 and questions 16 on the next page, should be used to record where important documents are kept. It will help your relatives and your Executors, who have to collect all your assets, to know where they are.

### **9. Bank Accounts with**

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### **10. Properties:**

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Your house deeds

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Your Mortgage with

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Other properties

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### **11. Premium Bonds**

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### **12. Saving books, pass books, savings certificates**

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### **13. Share Certificates**

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### **14. Insurance Policies**

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### **15. Birth, Marriage, Adoption Certificates**

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