



Organising Your Financial Affairs

A personal record of your financial information.



SECTION 1 – FINANCIAL ACCOUNTS

Description	Provider	Value	Account No.	Address	Telephone	Email	Notes
Life Insurance							
Home Insurance							
Car Insurance							
Medical Insurance							
Other Insurance							
Current Account							
Savings Account							
Cash ISA							
Premium Bonds							

Description	Provider	Value	Account No.	Address	Telephone	Email	Notes
Stocks & Shares ISA							
Investment Account							
Workplace Pension							
Private Pension							
State Pension							
Credit Card							
Personal Loan							
Car Finance							
Mortgage							

SECTION 2 – KEY CONTACTS

Description	Company	Contact Name	Address	Telephone	Email	Notes
Solicitor						
Doctor						
Accountant						
Financial Planner						
Tax Adviser						
Other						
Other						
Other						

SECTION 3 – YOUR WILL

A will can prevent worry, indecision and possible conflict between loved ones dealing with your estate. Any changes in circumstances should be reflected in your will.

You are NEVER too young to prepare a will. Even if you DO have a will, you should still record the following:

Key Questions	Key Information
What is the name and address of your solicitors?	
Where is your will kept?	
Who knows where your will is kept?	
What are their contact details?	
Who have you named as executors?	
What are their contact details?	
Do you hold a funeral payment plan/life insurance policy?	
Where is your funeral plan/insurance document kept?	
Where are your important documents kept?	
Additional Notes:	

SECTION 4 – NOTES

Notes