

My Affairs: Important Information and Where to Find It



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A helping hand for those you care about.

At Spend Time, we believe financial planning is about life, not just money. This document is designed to help you gather important information in one place, making life a little easier for the people you trust should they ever need to help manage your affairs.

You don't need to complete everything at once. Simply fill in the sections that are relevant to you and review them from time to time as things change.

We recommend storing this document somewhere safe and letting your executors, attorneys or loved ones know where it can be found. Upon request, we can hold an electronic copy securely for you if you wish.

Why complete this document?

None of us likes to think about a time when we may no longer be able to manage our own affairs but, in our experience, having everything recorded in one place can make a difficult time much easier for those around us.

This document is simply a place to record important information about your finances, property, legal arrangements and personal wishes. It can help your family, executors or attorneys understand what you have, where important documents are kept and who they may need to contact.

You can complete this document electronically using Adobe's free online tool [here](#), or print it and fill it in by hand. Remember to review it from time to time so it stays up to date.

Also see:

- Spend Time guide - Helping You Through the Next Steps
- Spend Time guide - What Happens to Your Digital Assets When You Die
- Spend Time template - Digital Asset Inventory

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About me

Your full name

Address

Telephone number

NI number

Date of birth

Tax reference

Spouse/partner name

Address

Telephone number

NI number

Date of birth

Tax reference

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People who help me

GP

Address

Contact number

Email address

Next of kin

Address

Contact number

Email address

Main emergency
contact

Address

Contact number

Email address

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People who help me manage my affairs

Name of financial
planner/firm

Address

Contact number

Email address

Name of solicitor
firm/contact

Address

Contact number

Email address

Name of accountant
firm/contact

Address

Contact number

Email address

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My Will

Where the original is stored	
Dated	
Executor 1	
Executor 2	
Anything else someone should know For example: • trust documents • property deeds • safe deposit box details • charitable gifts • other important documents	

Lasting Power of Attorney (LPA)

Type	Property & Affairs	Health & Welfare
Made by		
Name & address of attorneys		
Registered?		

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Bank Accounts and Savings (Single & Joint)

Bank name/address		
Sort code		
Account no.		
Single or Joint		

Credit cards

Name of credit card company		
Account no.		

Loans and Borrowing

Company		
Account no.		

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My assets

Investment bond/General Account (state name of platform if any)	Details	Plan no./Account no.	Single/Joint

ISA/LISA/etc. (state name of platform if any)	Details	Plan no./Account no.	Single/Joint

Savings & life assurance plans	Details	Plan no./Account no.	Single/Joint

Pension Fund	Details	Plan no./Account no.	Single/Joint

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My Pension

Provider (plus name of any platform)	Latest plan value £	Plan no.	Is it paying you an income? Yes/No

Final Salary Pension

Note any information including the contact details of who pays:

My main residence

Address	
Approximate Value £	
Ownership Single/Joint	
Outstanding loan information	

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Other Investments and Valuable Items

Shares (state if held on a platform or certificated)	Details	Plan no./Account no.	Single/Joint

Valuable Personal Possessions
For example jewellery, artwork, antiques or collections.

Other assets e.g. national savings	Details	Plan no./Account no.	Single/Joint

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Assets that may qualify for Inheritance Tax relief

Name	Type of shares e.g. EIS/BR company shares	Date purchased or date business established	Date became IHT exempt	Date it might pay out

Trusts and Inheritances

Name of donor & your relationship to donor	Title of trust if applicable	Date gift or trust established	Do you have a copy of the trust deed?	Extent of interest in gift or trust

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Holiday home

Address	
Approximate Value £	
Ownership Single/Joint	
Outstanding loan information	

Investment properties

Address	
Approximate Value £	
Ownership Single/Joint	
Outstanding loan information	
Tenanted Yes/No	
Rent information & name of any agent	
Notes e.g. where are deeds, tenancy agreements	

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Gifts made in the last seven years

Date	Amount	Recipient	Donor	Documentation e.g. trust deed, letter

Any important family members or beneficiaries

Name	
Address	
Contact information	
Name	
Address	
Contact information	
Name	
Address	
Contact information	

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Organisations I'm involved with

Name	Membership no.	Contact information

Household Accounts and Regular Payments

(attach a current list of standing orders and direct debits from each bank account)

Name	Account reference	Contact information

Anything else that would be helpful to know e.g. where items listed in this document are stored

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My Funeral Wishes

Funeral plan in place? Yes/No

Plan contact details and plan no.

What type of service would you like?

Cremation Yes/No

If you plan on cremation would you like your ashes interred or scattered?

Burial Yes/No

Location of cemetery or cremation

Location for any church or funeral service

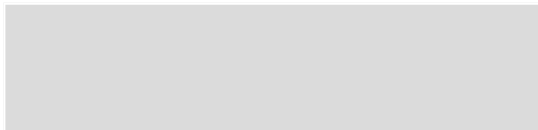
Any other funeral arrangements or wishes?

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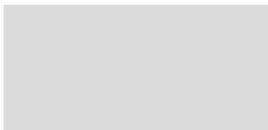
Helpful Documents you may wish to keep with this record

- ✓ A copy of your Will
 - ✓ Lasting Powers of Attorney
 - ✓ Trust documents
 - ✓ Recent property valuations
 - ✓ Pension summaries
 - ✓ Gift records
 - ✓ Any other important certificates or paperwork
-

Signed



Dated



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Spare pages for any additional notes

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spend time
FINANCIAL PLANNING



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