

# My Legacy

A modern-day biscuit tin for your  
financial and personal affairs



# My Legacy is a modern-day equivalent of the traditional biscuit tin

It is designed to help you keep track of what you have. By keeping a note of your personal and financial information as well as where important documents are held, you can use it as a quick reference in the future, update it when things change and use it in your discussions with your Personal Wealth Adviser.

Just like the traditional biscuit tin that held all important family documents, My Legacy serves as a tool to help you keep an organised record of what you have and what's important to you.

**Please note:** It is very important to keep this document in a safe place

Name:

Completion date

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## My important contacts

Next of kin:

Contact details:

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Financial adviser:

Contact details:

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Accountant:

Contact details:

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Solicitor:

Contact details:

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Doctor:

Contact details:

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## My important documents

I have a will

Yes

No

My will is held at:

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I have a living will

Yes

No

My living will is held at:

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I have a power of attorney covering financial and property matters

Yes

No

My financial /property power of attorney is held at:

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I have a power of attorney covering health and welfare matters

Yes

No

My welfare power of attorney is held at:

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I have a funeral plan

Yes

No

My funeral plan is held at:

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## My properties

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Main address:

Do you own or rent?

Owner      Tenant

Do you rent the property to tenants?

Yes      No

Title deeds held at:

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Second property address:

Do you own or rent?

Owner      Tenant

Do you rent the property to tenants?

Yes      No

Title deeds held at:

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## My assets

### Bank accounts:

Bank name and address	Type of account

### Savings accounts:

Provider name and address	Type of account

### Investment accounts /portfolios:

Provider name and address	Type of account

Pensions:

Provider name and address

Type of pension


Life assurance /protection policies:

Provider name and address


Trusts that I benefit from:

Trust name

Benefit that I receive


Other notable assets:

Type	Details

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Other notable assets:

Type	Details

## My liabilities

### Credit cards:

Provider name and address


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### Loans:

Provider name and address


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### Mortgages:

Provider name and address

Mortgaged property

Provider name and address	Mortgaged property

## My gifts and loans to others

Gifts:

Recipient	Amount/item	Date given	Documentation held at

Loans:

Recipient	Amount/item	Date given	Date to be repaid	Documentation held at

## My trusts and appointment as trustee

Trust name	My involvement	
	Settlor	Trustee
	Settlor	Trustee
	Settlor	Trustee

## My organisations

Organisation name	My involvement

## My utility providers

Organisation name	Provider
Electricity	
Gas	
Phone/broadband	
Water	
Other	

## My notes



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