

My Estate

What I own, where it is kept,
my wishes and who to contact

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Good estate planning is about giving someone the peace of mind that their affairs are in order and that as far as possible, what they want to happen in the future, will happen and in the way they wish.

At Chase Buchanan we focus on helping our clients create the optimum 'estate plan' matching their wishes. In addition to minimising the likely impact of inheritance and succession taxes, a key part that we focus on is ensuring that a client's family can readily act upon the person's wishes at what is a most difficult time, when death has occurred.

People often understandably avoid discussing death and the practical aspects that their family will face when mourning their loss. However, in our experience, it often helps bring peace of mind to clients to know that their family won't have to struggle to find relevant details and paperwork at a time when they will want to focus on their shared memories.

This document is designed to enable you to record relevant information so that your family can easily access any contact information and documentation, together with a summary of your personal wishes. It is not designed to act as a Will (which you should have in place and review regularly), it's simply a single point of reference for you to leave for your family so they readily know your immediate wishes and where to find any important information.

This document is for you to use as you wish – there may be some sections you choose not to complete, and in other cases you may want to add a continuation sheet. You may well amend it in the future and if you need a further blank copy please ask us at Chase Buchanan and we will provide one. You will find the information can be recorded into the following sections:

- 1 My personal details
- 2 Who to contact upon my death
- 3 My personal funeral wishes
- 4 Where are my documents stored
- 5 Other relevant information

Date

1 Personal Details

Client full name

Phone numbers: Mobile

Home

Work

Email

National Insurance number

Tax reference

Other

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2 Who to contact upon my death in addition to my close family

	Name and address	Phone number	Email
CB Adviser			
UK Lawyer			
Overseas Lawyer			
UK Accountant			
Overseas Accountant			
Executors of Will			
Doctor			
Dentist			
UK Tax Office			
Overseas Tax Office			
Bank			
Trustees			

2 Who to contact upon my death in addition to my close family (continued)

	Name and address	Phone number	Email
Clubs/Societies			
Other			
Other			

3 Personal wishes

Organ donation preferences

Where donor card is likely to be found

Cremation	YES	NO
If Yes: Ashes Interred	YES	NO
Ashes Scattered	YES	NO
If Yes: Where and when		

Burial	YES	NO
If Yes: Where		

Funeral service	YES	NO
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If Yes, where should it take place and do you have any preferences you would like to express beyond the points covered below (for example, the type of service or who leads it)?

3 Personal wishes (continued)

The Service	Yes	No
Music at entry?	List 3	
Reading	Yes	No
Any special tribute	Yes	No
Music at exit	Yes	No

Who I particularly would like to invite

4 Where my key documents are stored

	Where held/stored	Contact Details	Account/Plan/ Certificate number
Last Will and Testament			
Funeral Policy			
Main Residence deeds			
Other property			
Shares and/or gifts			
Investment Bonds			
ISAs/PEPs			
Other Investment funds			
Pensions			
Other assets			
Birth Certificate			
Marriage certificate			
Passport			
Bank accounts			
Bank cards			

4 Where my key documents are stored (continued)

	Where held/stored	Contact Details	Account/Plan/ Certificate number
	Credit cards		
	Building society accounts		
	Driving licence		
	Car ownership forms		
	Mortgage		
	Other loan account		
	Utility bill statement		
	Other (including instructions as to where to find relevant keys or other items)		

Digital information relating to accounts I hold. (Not passwords, but details to allow them to be contacted/notified)

5 Other relevant information

Any other relevant information, e.g., business interests not noted above, care home preference and/or power of attorney details that may be relevant during my lifetime. Other information that is important to me.

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