



Advice for Life
Financial Planning

My Assets

This document contains information which may be helpful in the event of my death or incapacity.

Useful Contacts

GOV.UK

www.direct.gov.uk

The Probate Service

www.theprobateservice.gov.uk

Citizens Advice

www.citizensadvice.org.uk

Local Dementia advisor

www.alzscot.org/living-with-dementia/getting-support/find-support-near-you/dementia-advisor-dumfries

Free Phone 0808 808 3000

Alzheimer Scotland Help line

www.alzscot.org | helpline@alzscot.org | 0808 808 3000

Care information Scotland

www.careinfoscotland.co.uk | 08456 00100

Citizens Advice Scotland

www.cas.org.uk/bureaux (Useful for advice on Welfare benefits)

Dumfries and Galloway Carers Centre

www.dgalcarers.co.uk

The Princess Royal Trust for Carers

www.carers.org/home | 01402 215066

MECOPP Carers Centre Supporting minority ethnic carers

www.mecopp.org.uk | 0131 4672994

Create a playlist www.playlistforlife.org.uk

A useful form to write your life story on can be found at:

www.alzscot.org/information_and_resources

Your GP practice and Local Social Work department



Key Information

| | |
|-------------------------|--|
| Name: | |
| Date of Birth: | |
| National Insurance No.: | |

Power of Attorney

| | |
|-------------------------------------|--|
| Name: | |
| Address: | |
| Telephone Number: | |
| Has Power of Attorney been enacted: | |
| Certificate Location: | |

Guardianship

| | |
|------------------------------------|--|
| Has Guardianship been applied for: | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| If so, name and contact details: | |

My Will

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|--|--|
| The original copy of my Will is held with: | |
| The location of my copy is: | |
| The Will is dated: | |
| The Will was drawn up by: | |

| | |
|--------------------------|--|
| My Executors are: | |
|--------------------------|--|

Useful Contacts

| | Name | Address | Telephone No. |
|---|-------------|----------------|----------------------|
| Advice for Life Financial Adviser: | | | |
| Solicitor: | | | |
| Accountant: | | | |
| Doctor: | | | |
| Employer: | | | |

My Accounts

It can be helpful to keep your financial documents together in one place. Where possible, this should be somewhere secure like a locked filing cabinet or safe.

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| My financial documents can be found: | |
|---|--|

| | Provider/Address | Account Details | Contact Details |
|---------------------------|-------------------------|------------------------|------------------------|
| Current Account: | | | |
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| Savings Account: | | | |
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| Credits Cards: | | | |
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| Stocks and Shares: | | | |
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My Accounts Continued

| | Provider/Address | Account Details | Contact Details |
|---|------------------|-----------------|-----------------|
| ISAs: | | | |
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| Pensions: | | | |
| | | | |
| | | | |
| Investment Bonds/ Unit Trusts: | | | |
| | | | |
| | | | |
| Premium Bonds/ National Savings: | | | |
| | | | |
| | | | |
| Life Assurance: | | | |
| | | | |
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| Loans: | | | |
| | | | |
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| Mortgages: | | | |
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|----------------------|--|
| Funeral Plan: | |
|----------------------|--|

My Property

| | Address | Approximate Value | % Ownership | Mortgage Provider |
|-------------------------------|----------------|--------------------------|--------------------|--------------------------|
| Main Residence: | | | | |
| Additional Properties: | | | | |
| Additional Properties: | | | | |
| Additional Properties: | | | | |
| Additional Properties: | | | | |

Your Family Tree

Name

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Spouse / Partner

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Parents

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Grandparents

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Children

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Brothers & Sisters

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Key Notes / Other Connections

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Please use the following pages to document any additional important information which you think would be useful in the event of your incapacity or death.

Examples of such are as follows:

- Passwords/Logins
- Any gifts made during your lifetime
- Any specific wishes
- Requests regarding medical research bequests, deed/safe box access etc
- Where important items are stored
- Who you would like to be the main point of contact to liaise with solicitors/financial advisers in the event of no power of attorney



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