

mgi midgley snelling llp

CHARTERED ACCOUNTANTS



In the event of the death of

**This booklet contains essential information.
Please read immediately.**

IT IS SAID THAT DEATH AND TAXES ARE THE ONLY TWO CERTAINTIES IN LIFE!

Not surprisingly, most people don't like to contemplate their own death but that can result in those who survive them being faced with having to sort out a financial mess, at a time when this is the last thing they wish to do.

The combination of a general increase in the value of property and other assets, with the static level at which Inheritance Tax becomes payable, makes it essential to at least consider estate planning.

EVERYONE SHOULD HAVE A WILL

This does not need to be an expensive or complicated exercise but can save a great deal of time, expense and inconvenience and should ensure that your estate goes where you want it to.

To see what happens if you die without a will ("intestate") see the enclosed flowchart!

Even if you have a will, it can still be difficult for the executor to collect details of your assets and liabilities.

To make this task easier, we have prepared this booklet for you to record the essential information that is needed rapidly following a death.

Whilst the initial completion can seem a bit daunting, it will save a lot of time and anguish in the future.

Traditionally, family members or solicitors have been automatically appointed as executors of estates but have you considered appointing us? If we already act for you we will already know a lot about your financial affairs, therefore we are in an ideal position to either act as executor or assist family members in their duties.

The enclosed note briefly summarises the duties of the executor.

Whilst we cannot claim to help stave off the inevitable, we can advise on how to minimise taxes, both during your lifetime and on your death, so if you would like to discuss ways in which we can help or would like more copies of this booklet, please contact us.

FINANCIAL AFFAIRS DETAILS

(Please supply any additional information on the blank sheet provided).

This information is about the estate and assets of:

Name (stating any alias or variation in which assets held and maiden name if married):

.....

Address:

.....

National Insurance No.:

Date of Birth:

1. IMMEDIATE, ESSENTIAL INFORMATION

1.1 Location of Will:

1.2 Funeral wishes (cremation, burial, flowers/no flowers, donations to specified charity, etc.):

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1.3 Other wishes eg, body for medical research, organ donation or "do not resuscitate":

.....

2. RELEVANT PERSONAL INFORMATION

Name, address, telephone no. of:

2.1 Next of kin:

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2.2 Executors:

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2.3 Solicitor:

.....

2.4 Accountant:

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2.5 Stockbroker:

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2.6 Bankers: (see 4.6)

.....

2.7 H. M. Inspector of Taxes (include ref. no.):

.....

Location of copy tax returns:

2.8 Doctor:

.....

2.9 Others:

.....

2.10 Location of personal documents, eg, birth/marriage certificates:

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3. FAMILY

3.1 Full names of children: Still alive: Deceased: If deceased, names of any of their children:

✓ ✓

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3.2 Are parents still alive?

If so, full names:

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3.3 Full names of any brothers and sisters:

Still alive: ✓

Deceased: ✓

If deceased, names of any of their children:

.....	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>

3.4 Are grandparents still alive?

If so, full names:

3.5 Full names of any uncles and aunts:

Still alive: ✓

Deceased: ✓

If deceased, names of any of their children:

.....	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>

4. ASSETS AND LIABILITIES

4.1 Main residence:
Address:

.....
Sole name (or jointly and with whom):

Subject to/free of mortgage: £

Mortgagee/lender:

Address:

.....
Reference no: (see also 4.6)

Location of Title Deeds:

4.2 Other properties:

Sole name (or jointly and with whom):

Subject to/free of mortgage:

Mortgagee/lender:

Address:

.....
Reference no: (see also 4.6)

Location of Title Deeds:

4.3 Stock Exchange/government securities (location of certificates):
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4.4 Family company/unquoted shares (location of certificates and name and address of auditors):
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4.5 Other investments, eg, premium bonds, national savings certificates, ISAs etc (location of certificates etc):
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4.6 Bank accounts/building society accounts:

Bank/Society name and address: Type of account: Account no.: Mandate/signing powers:

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4.7 Other business or agricultural assets:

4.8 Miscellaneous assets:

4.9 Liabilities (eg, bank overdrafts, loans etc.):

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5. PENSION/INSURANCE ARRANGEMENTS

5.1 Retirement pensions and life assurance policies:

Insurance co./Pension Provider: Policy no.: Type: Location of policy:

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5.2 Details of any nomination or written wish as to the beneficiary of insurance policies:

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6. CANCELLATION/NOTIFICATION/ALTERATION

6.1 Membership of/subscriptions to:

Professional/trade associations:

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Clubs:

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Other organisations (eg, AA, RAC, RHS etc.):

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6.2 Offices held (eg, company secretary, treasurer, chairman etc.):

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6.3 Credit cards/bank cards:

Type:

Number:

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6.4 Direct debits/standing orders: (see also 4.6)

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6.5 Registration documents for vehicles:

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7. MISCELLANEOUS ITEMS

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Signed:

Dated:

We suggest you supply one copy to your Solicitor or Executor and keep a copy yourself.

MGI Midgley Snelling LLP

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