

Everything together.

For the day you need it.

Your personal and financial affairs organiser



Investing a little time now to complete this document can help your partner, relatives or friends save considerable time and avoid unnecessary costs in the future.

This is not a Will and should not contain instructions about what should be done with your money or possessions. It is a record of where your personal records, assets and documents are located. Keep it somewhere safe and only tell trusted person(s) where it is.

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My details

Name

Date of birth

Address

Mobile

Email

Date completed / last updated

Personal Public Service Number

MyGovID account details

Next of kin

Name

Contact number

Email

Name

Contact number

Email

My advisors

Accountant details

Name

Contact number

Email

Financial Advisor

Name

Contact number

Email

Doctor details

Name

Contact number

Email

Other

Name

Contact number

Email

Certificates and documents

My marriage certificate(s) can be found

My birth certificate can be found

Power of Attorney declaration can be found

My private pension/life assurance/other policies may be found

Grave plot/funeral arrangements papers may be found

My account(s) statements may be found

The property deeds/tenancy agreement may be found

Will details

My Will can be found

Date of Will

My Solicitor

Name

Address

Contact number

Bank accounts

1

Account type

Account no.

Bank address

2

Account type

Account no.

Bank address

3

Account type

Account no.

Bank address

4

Account type

Account no.

Bank address

Other financial accounts

Post Office, Credit Union, Shares, Cryptocurrency, etc.

1

Account type

Account no.

Account address

2

Account type

Account no.

Account address

3

Account type

Account no.

Account address

Online accounts

Online storage accounts

iCloud

Dropbox

Google drive

Other

Social media accounts

Facebook

Instagram

X

LinkedIn

TikTok

Other

Password(s) for my computer & online accounts may be found in

Additional email addresses

Other possessions & paperwork

1.

Location

2.

Location

3.

Location

4.

Location

My pet

Vet name

Vet location and contact details

Important instructions

Notes

Please note that this document is for your personal use only and should not be shared with anyone else. This is a purely optional document and there is no requirement, whatsoever, to complete it. It is simply a helpful tool to make sure all your details are kept in one place, should you choose to use it.