

This form aims to help you prepare for an emergency. It will provide a comprehensive summary of your day-to-day life, as well as your final wishes, lessening the worry for your loved ones at a stressful time.

About Me

Full Name (plus maiden name)

Commonly known as

Date & Place of Birth

National Insurance Number

About My Spouse / Partner / Next of Kin

Full Name (plus maiden name)

Commonly known as

Date & Place of Birth

National Insurance Number

The Expert Wealth Client Portal

We know that you want to plan for the future. It's why we have provided this document. But did you know you can also use the Expert Wealth client portal to store important documents, keep track of essential contact details, and manage your financial affairs?

Web address

Username

Location of password

Having a power of attorney and a will in place can lessen worry and remove potential conflict at a stressful time. You are never too young but put either in place.

Lasting Powers of Attorney

Name & address of solicitor

Where your LPA is kept

Who knows where it is kept?

What are their contact details?

Who have you named as your attorney?

What are their contact details?

Your Will

Name & address of solicitor

Where your will is kept

Who knows where it is kept?

What are their contact details?

Who have you named as your executor?

What are their contact details?

Funeral arrangements

Do you have funeral plans?

Where are they kept?

Who should be informed?

What are their contact details?

Are you a registered Organ Donor?

If yes, please provide details

Important Documents

Where is your Birth Certificate kept?

Where is your Marriage Certificate?

Financial & Important Information

| | Provider | Account Number | Contact Details |
|--------------------------------------------------------------|----------------------|----------------|-----------------|
| Your Workplace Pension | <input type="text"/> | | |
| Your Private Pension | <input type="text"/> | | |
| Your State Pension | <input type="text"/> | | |
| Other Pensions <i>(use additional sheet if required)</i> | <input type="text"/> | | |
| Investment plans / platform | <input type="text"/> | | |
| National Savings & Investments | <input type="text"/> | | |
| Building society savings accounts | <input type="text"/> | | |
| Life Insurance | <input type="text"/> | | |
| Home Insurance | <input type="text"/> | | |
| Car Insurance | <input type="text"/> | | |
| Other Insurance <i>(use additional sheet if required)</i> | <input type="text"/> | | |
| Current Account Bank | <input type="text"/> | | |
| Business Account | <input type="text"/> | | |
| Other Accounts <i>(use additional sheet if required)</i> | <input type="text"/> | | |

Other Professionals

| | Name | Address | Telephone number |
|----------------------------------------------------|----------------------|---------|------------------|
| Business Partner | <input type="text"/> | | |
| Doctor | <input type="text"/> | | |
| Dentist | <input type="text"/> | | |
| Accountant | <input type="text"/> | | |
| Financial Adviser | <input type="text"/> | | |
| Other <i>(use additional sheet if required)</i> | <input type="text"/> | | |

Social Media

| | Username | Associated email | Notes |
|----------------------------------------------------|----------------------|------------------|-------|
| LinkedIn | <input type="text"/> | | |
| Twitter | <input type="text"/> | | |
| Facebook | <input type="text"/> | | |
| Instagram | <input type="text"/> | | |
| Other <i>(use additional sheet if required)</i> | <input type="text"/> | | |

Be sure to keep this document secure but let someone know that it exists too, and where it can be found. Make sure this is a safe and secure place.

Remember too that you can use the Expert Wealth client portal to keep all your important documents, PIN numbers, and passwords safe.

Notes

Use this section to supply further information that hasn't been requested, or that you didn't have room for elsewhere:

(Do you have credit cards, store cards, medical insurance, and mortgage details, for example? Or login details for websites such as Amazon and eBay?)