



# PERSONAL ASSETS RECORD

For the Assistance of clients

FIRM DETAILS:

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*NB. Completing this list is NOT making a Will, nor is it instructions for a will*

**1. WHY COMPLETE THIS LIST?**

Because your Executors/Next of Kin/Solicitor could spend many unnecessary hours trying to locate and identify possessions and essential documents after your death and completion of this list could save much time and therefore legal costs.

**2. WHERE SHOULD I PUT THE LIST?**

Give one copy to your solicitor and, if you wish, keep a copy in another secure place.

**3. HOW OFTEN SHOULD I REVIEW SAME?**

The list should be updated as your assets or personal circumstances change.

PERSONAL DETAILS

Full name and address \_\_\_\_\_

Former addresses \_\_\_\_\_

Date of birth \_\_\_\_\_

PPS number and type and location of tax office \_\_\_\_\_

Occupation \_\_\_\_\_

Residence \_\_\_\_\_

Domicile of origin \_\_\_\_\_

Particulars of any instructions as to Funeral/Grave/Arrangements \_\_\_\_\_

Date of this list \_\_\_\_\_

WILL

Date of Will \_\_\_\_\_

Location of Will \_\_\_\_\_



