

infinity*

My Financial File
Keeping my affairs in order



IMPORTANT DOCUMENTS

My documents and where they are kept

Would those close to you know where to find your key documents and other important information if they needed to?

The people you care about most could face real difficulties if something happened to you and they couldn't find your important paperwork or didn't have details of key contacts such as your solicitor and accountant. This happens often – sometimes because someone has not paid enough attention to organising their affairs but also because they may have hidden their paperwork away too well.

Accurate recording of personal affairs is especially important for expats who may have papers and advisers in different countries that come under different legal jurisdictions.

Trying to track down important paperwork and decipher it can be extremely challenging for loved ones should something unfortunate happen. It often results in unnecessary stress but can also have far more significant consequences if your assets go undetected.

Across the world, there are hundreds of billions of dollars of financial assets sitting around unclaimed and held by life insurance companies or in bank accounts.

Without the correct paperwork, it is almost impossible to reunite these assets with their rightful owners. Another consequence is that those close to you may have to wait longer to receive their inheritance if the executors of your will are left searching for paperwork when you die.

A simple checklist

To help you keep track of key documents and other important information, we have created a simple checklist. It won't take long to fill in but could make all the difference to the people you have chosen to handle your affairs. For your convenience this form is an editable document which you can save digitally or print out. Please follow the safety and security guidance below.

Safety and security

Important Warning

Much of the information in this document is sensitive and it is vital that you take action to safeguard and protect the contents.

If you complete and store information digitally please secure it with encryption and ensure other copies are deleted completely from your hard drive. Use a flash drive or disc to lodge a digital copy with a solicitor or other professional used to handling sensitive information.

If you are in any doubt about the security of digital data, print a copy of the blank form and complete it by hand. The completed form should always be securely stored and locked in a safe environment or lodged with your legal representative.

Please complete in BLOCK CAPITALS

Your details

Name

Date of Birth

Passport Number

Key Contacts

Name and Address

Email

Phone Number

My will

My main will is located

My will is dated

It was drawn up by

My Executors are

Other Wills

Often expatriates will have other wills in different countries. If so please record the information below.

My second will is located

My will is dated

It was drawn up by

My Executors are

My third will is located

My will is dated

It was drawn up by

My Executors are

Other information

You can use the space below to record other important information such as funeral arrangements and other requests.

Powers of Attorney

Date made

Name and address of attorney

Any other information

Bank Accounts

Name of bank <i>(name and address of branch)</i>	Sort code	Account number	Contact

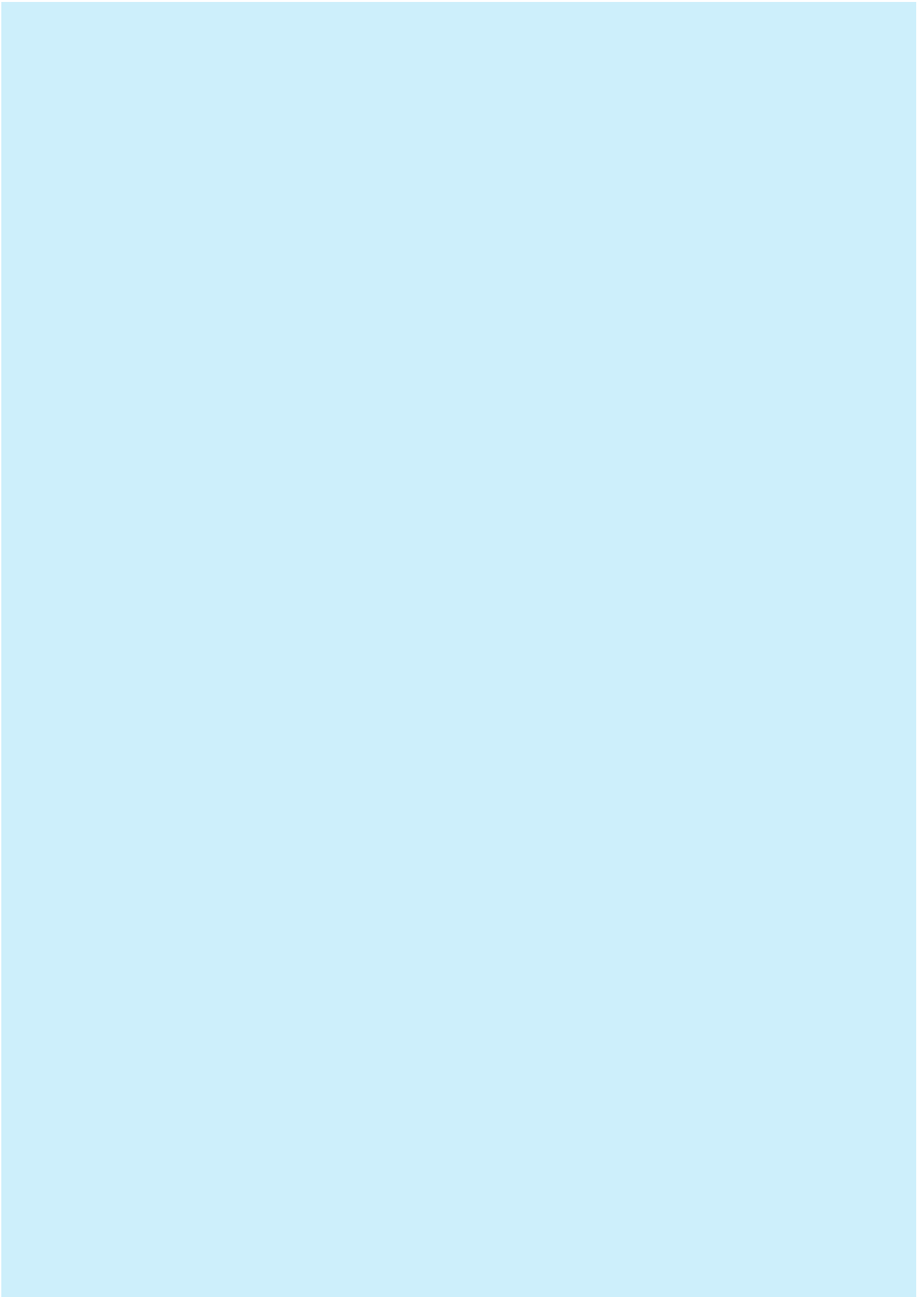
Credit cards

Credit card company	Account number	Contact

Loans

Company	Account number	Contact

Notes



Pension

Provider
(name and address)

Latest plan
value

Plan number

Contact

Notes

Property assets

Main residence address	Approximate value	Ownership	Outstanding loan
Other property address	Approximate value	Ownership	Outstanding loan

Notes

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