

Leighan’s List

What I own and where it is kept

If you are using this form, don’t forget to ensure it is stored securely.

# Personal information:

Full Name: Initials:

Address: Postcode:

Home Phone Number: Mobile Number

National Insurance Number: HMRC Reference (if applicable): Date of Birth:

# Key Contacts:

## Employer

Name and Address Contact:

## Pension Provider(s)

Name and Address Contact:

## Doctor

Name and Address Contact:

# Key Contacts:

## Dentist

Name and Address Contact:

## Solicitor

Name and Address Contact:

## Others

Name and Address Contact:

# My Will:

The original of my Will is held with:

The Will was drawn up by:

The Will is dated:

My Executors are:

# My Will:

## Other Information

Please use this section to record any additional information e.g. – requests regarding funeral arrangements, deed/safe box access, computer access codes

# Powers of Attorney:

Date made:

Has it been registered?

Yes No

Names and addresses of individuals to be notified of any application to register the Power of Attorney

Name and address of attorneys:

# Bank / Building Society Accounts

Name and Address of Bank /

Building Society branch Sort Code Account No: Contact

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# Credit Cards

Credit Card Company:

Account No:

Contact

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# Loans

Company:

Account No:

Contact:

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# My Assets

SAVINGS ACCOUNTS, including

instant access savings accounts,

ISAs, Premium Bonds, shares Provider:

Plan / Account No: Contact:

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| Comments / Notes: | | | |

# My Pension

Provider (name and address)

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| Comments / Notes: | | | |

# My Insurances

Provider (name and address)

Latest Plan Value

Latest Plan Value

Plan / Account No:

Plan / Account No:

Contact

Contact

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| Comments / Notes: | | | |

# My Property (Owned / Mortgaged)

Outstanding:

Type:

Address:

Value:

Ownership:

loan

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| Main Residence |  |  |  |  |
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| Comments / Notes: (include mortgage provider and account number, if applicable) | | | | |

# My Property (Rented / Leased)

Type: Address: Monthly Rental: Landlord Name: Notice Period:

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| Comments / Notes: (include landlord details, location of lease or rental agreements, if applicable) | | | | |

# Data Backups / Cloud Storage

Platform Username / Email Password

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# Social Media

Platform Username / Email Password

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| Google passport  (Gmail, Youtube etc) |  |  |
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| Government Agencies | Pensions Service, Jobcentre Plus (Benefits), HMRC (tax and Child  Benefits), Electoral Register, Housing Benefit, Council Tax, Bus  Pass, Disabled Parking Permits, Library Membership, DVLA,  The Passport Agency |

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| Name: | Account Number: | Contact |
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# Other Contacts

Home-related (Utility Companies, Contents and Building Insurance, Maintenance Agreements, if applicable e.g. servicing central heating, gardening, household appliances)

Name:

Account / Membership No:

Contact

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# Miscellaneous Information:

Details of Organisations and Clubs (e.g. gym membership, magazine subscriptions, professional body subscriptions)

Name:

Account / Membership No:

Contact

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**In memory of Leighan Elizabeth Phillips**

The Leighan’s List project seeks to provide employers with information they can use to include estate planning as part of their well-being offer to employees. The project shares the experience of the creators in resolving estates of family members (with and without wills) and reflects on what would have been helpful to manage those processes more smoothly. It does not seek to give advice or guidance and does not replace the need for individuals to obtain advice from suitably qualified legal professionals when considering a will.

The project is In memory of Leighan Elizabeth Phillips - a loving mother, partner, daughter and sister who spent most of her career in public service and who died in January 2021, aged 45.



Leighan Elizabeth

Phillips

1976-2021

This document is intended as a guide only for you to record details of your assets, what you own and where it is kept, to assist your executors to administer your estate. It is a generic guide only and will not necessarily cover all of your personal requirements. Accordingly, you should tailor it to match your personal position and not assume it is all-encompassing and suited to your personal needs. We accept no responsibility or liability for the contents or otherwise of this document, and you use it at your own risk.