



# Financial & Legal Records

## Instructions

Complete this record for all your online financial and legal records. Print and store in a safe place or email it to someone you have nominated to help manage your accounts on your behalf, i.e. your *'Power of Attorney'* or *'Enduring Power of Attorney'*.

Financial Accounts			
Bank/Building Society/Credit Union	Sort Code	Account Number	Name(s) on the account

Pensions & Benefits			
Pension Provider	Reference Number	Benefit Type	Reference Number

### Mortgage/House Deeds/Tenancy Agreement

Mortgage Provider	Reference Number	Name(s) on the account	Contact details

### Insurance Policies/Shares/Investments

Title of insurance (house, car, life, pet, other)	Provider	Reference number	Contact details

### Digital Will

Online account/social media channel	Username/email address	How would you like this account to be managed e.g. close, memorialise,	Name of the person you have asked to manage this account, i.e. Digital Executor

