



Personal Organiser

What is the Personal Organiser?

The Personal Organiser is designed to help you keep a concise record of your personal affairs and papers. Investing a little time now to complete this form could save your spouse, partner, relatives or friends a great deal of time and expense in the future.

Who is the Personal Organiser for?

The Personal Organiser is for everybody. There are three sections:-

- **Section 1** gives information e.g. key advisers, location of your will etc, which might be needed quickly.
- **Section 2** covers your financial affairs: bank accounts, insurance policies, other assets.
- **Section 3** covers other general information e.g. employment record, membership of clubs, etc.

You need only fill in those parts that are relevant to you.

What do I do with the completed Personal Organiser?

The completed form will contain confidential information, which should not be left lying around. We recommend that either:

1. You keep the form somewhere safe, with us here at Davis Burton Sellek, in your bank or with your solicitor.
2. You give the form to someone you trust to hold in a safe place for you.

What is the difference between the Personal Organiser and my Will?

The Personal Organiser is not a will and should not contain instructions about what should be done with your money or possessions. It is a record of where your key personal records, assets and papers can be located.

Name

Address

Date Completed

Personal Organiser is held at

Section 1

Advisers

Accountant

Name

Address

Telephone

Doctor

Name

Address

Telephone

Solicitor

Name

Address

Telephone

IFA

Name

Address

Telephone

Other Advisers

Name

Address

Telephone

Name

Address

Telephone

Name

Address

Telephone

Name

Address

Telephone

In the event of my death or incapacity due to illness please contact:

Name

Address

Relationship

Telephone

Name

Address

Relationship

Telephone

My Will

The original of my Will is

The Will is dated

The Will is drawn up by

Address

The Executors are

Funeral Arrangements (Note any preferences)

'Living Will' declaration to family and doctors may be found

Power of Attorney for me is held by

Medical Research Bequests/Donor Card may be found (eyes, kidneys, etc)

My deed/safe box may be found

The key/password can be found in a sealed envelope, cross-signed by me, held at

The access codes to my computer are to be found in a sealed envelope, cross-signed by me, held at

Section 2

Account(s) - (Banks, Building Society, etc)

I have _____ (number) accounts held at the institution(s) indicated below:

Name of Institution	Name of Institution
Address	Address
Telephone	Telephone
Account No	Account No
Name of Institution	Name of Institution
Address	Address
Telephone	Telephone
Account No	Account No

Investments (e.g. shares, unit trusts, premium bonds, national savings certificates, etc)

Type	May be found

Credit Cards

Type of Card	Credit Card No

Main Residence

Address

Joint Owner (Name & Address)

Telephone

Location of Deeds

Mortgage Lender (Name & Address)

Account Number

Other Properties

Address

Joint Owner (Name & Address)

Telephone

Location of Deeds

Mortgage Lender (Name & Address)

Account Number

Other Properties

Address

Joint Owner (Name & Address)

Telephone

Location of Deeds

Mortgage Lender (Name & Address)

Account Number

Other Properties

Address

Joint Owner (Name & Address)

Telephone

Location of Deeds

Mortgage Lender (Name & Address)

Account Number

Insurance Policies e.g. Life, Car, Home, Health

Policy type

Policy Number

Name & Address

Telephone

May be Found

Policy type

Policy Number

Name & Address

Telephone

May be Found

Policy type

Policy Number

Name & Address

Telephone

May be Found

Policy type

Policy Number

Name & Address

Telephone

May be Found

Policy type

Policy Number

Name & Address

Telephone

May be Found

Policy type

Policy Number

Name & Address

Telephone

May be Found

Section 3

My Birth/Marriage Certificates may be found

Other documents relating to marriage may be found

Details of employment

Company Name

Address

Employment Reference

Telephone

Please contact

I am/am not a member of a company pension scheme

National Insurance number

Company Name

Address

Employment Reference

Telephone

Please contact

I am/am not a member of a company pension scheme

National Insurance number

Directorships

Company Names

Taxation - The tax office that deals with my affairs is:

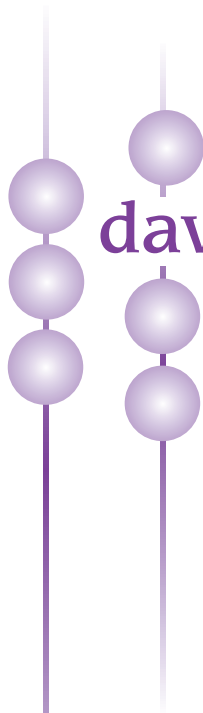
Address

Telephone

My Tax Reference number

Tax Advisers (if any)

Provided by: Davis Burton Sellek



davisburtonsellek

chartered accountants
business & tax advisers

the galleries
charters road sunningdale ascot
berkshire SL5 9QJ

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