



Legacy Planner: Securing your legacy



Introduction

Planning your finances is a lifelong journey – one that requires thoughtful saving, strategic investments, and careful preparation for the future. While many focus on building wealth, fewer take the time to plan for what happens after they pass.

Without a well-organised record, loved ones may struggle to locate assets, manage financial responsibilities, and fulfill your final wishes. That's why we've created the Legacy Planner – an easy to complete record designed to bring clarity, structure, and peace of mind.

This document serves as your comprehensive financial and estate inventory, capturing essential details about your assets, liabilities, and instructions for your family. By completing it now, you are offering them the ultimate gift: guidance when they need it most.

From your will and property records to investments and digital assets, the Legacy Planner ensures nothing is overlooked. It helps eliminate confusion, minimise delays, and reduce financial stress for those left behind—allowing them to focus on what truly matters: honouring your legacy.

Use our handy form below to record the important information your loved ones will need in the future. Keep this document somewhere safe alongside other important documents, and ensure your loved ones know where to find it when the time comes.

Take control of your future today, so your family won't have to worry tomorrow.

Useful websites

TELL US ONCE

<https://www.gov.uk/after-a-death/organisations-you-need-to-contact-and-tell-us-once>

A very handy service. Tell Us Once will communicate with all HMRC, Department of Work and Pensions, The Passport Office, Local Council, Veterans UK and other need-to-know government offices.

THE BEREAVEMENT REGISTER

www.thebereavementregister.org.uk

Helps remove the deceased's details from marketing databases to prevent unwanted mail.

SETTLD

www.settld.care

Settld is a 'Tell Us Once' equivalent service for individuals to notify private sector Service Providers, such as banks, utilities, insurance and pension companies, of a death.

DEATH NOTIFICATION SERVICE

www.deathnotificationsservice.co.uk

A free UK-wide service that notifies multiple banks and building societies in one go.

GOV.UK PROBATE & BEREAVEMENT SUPPORT

www.gov.uk/after-a-death

A step-by-step guide for handling wills, probate, and government notifications after someone passes away.

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Personal details

This section covers all the standard information that various businesses and bodies use to identify you.

Personal details

Full name

Previous Names (including aliases, maiden name or names from previous marriages)

Date of Birth

Place of Birth

National Insurance Number

Passport Number

Driving licence number

Organ donor?

Yes No

Contacts

Use this section to note down the contact details of whoever might need to be contacted when you die. This will probably include your partner as well as your solicitor, accountant, financial advisor and so on.

Next of kin or key contact

Name

Relationship

Phone number

Address

Email address

Other useful contacts

Solicitor

Name/email/phone number

Accountant

Name/email/phone number

Financial Advisor

Name/email/phone number

Doctor

Name/email/phone number

Neighbours (or whoever has keys)

Name/email/phone number



Funeral wishes

Many people who organise a funeral don't even know whether their loved one wanted a burial or cremation, so use this section to outline your funeral wishes in as much detail as you can.

Some of the things you might want to note down may include:

- Do you want a funeral at all? Or would you prefer a direct cremation or burial? Or maybe you would prefer your body to be left to science.
- If you want a funeral, what type of service do you want? Would you like it to be religious, humanist, atheist and so on?
- Have you got a preferred cemetery or burial ground in mind?
- Would you like a memorial? What kind, and where would you like this?
- If you want to be cremated, do you want your ashes scattered, interred or disposed?
- Do you have a preferred funeral director?
- Would you like any particular music, prayers or readings?
- Who would you like to be invited to the funeral?
- Do you have a preferred casket, coffin or shroud?
- Would you like any flowers at your funeral, and if so, what type?
- Do you have a preferred venue for the wake?
- Would you like any donations to be made to any specific charities?

Funeral plan

I have a Funeral plan Yes No

If yes, who is it with?

Funeral plan documents

Are there any specific funeral wishes?

My will

Writing a will is one of the most important things you can do in your lifetime to ease the pain for your friends and family when you die. If you haven't already written one, it's definitely worth organising one now to detail what is to happen to your assets and possessions after you die.

Will

Is there a will?

Yes

No

Date

Where is it stored?

Executor(s) of your estate

Name

Email address

Phone number

Address

Name

Email address

Phone number

Address



Record of my important documents

You can use this section to outline what important documents you have, where they are stored and when the most recent version was made.

You might not have all of the documents listed here, so don't worry about filling out every section, just list what you've got.

I have power of attorney Yes No Date

My power of attorney is registered with the Office of the Public Guardian Yes No

Although power of attorney will end when you pass away, those acting as your attorneys will need to be notified of your death if they haven't been already.

Use this section to note down the contact details for those acting as your attorneys:

Contact details for attorney(s)

Name

Email address

Phone number

Address

Name

Email address

Phone number

Address

Other important documents

Birth certificate location

Marriage certificate location

Divorce certificate location

Passport location

Driving license location

Vehicle registration location

NHS medical card location

Other

Other



Finances

Working out finances can be one of the most stressful things about sorting out someone’s estate, so use this section to make a note of all your financial information, including accounts, savings pots, loans, mortgages, pensions, insurances and bills. Wherever you can, outline the companies you hold accounts with, any customer numbers which might be useful, and where you keep any statements or other documents relating to these accounts.

My finances are made up of the following products and accounts:

Accounts

- Current accounts
- Investments
- Savings account
- Shares

Insurances

- Life
- Home
- Buildings
- Car

Pension

- Defined contribution
- Defined benefit
- Private pension
- State pension
- Annuity

Utilities

- Gas
- Electric
- Water
- Mobile phone contract
- Broadband
- Television

Borrowing

- Mortgage
- Credit card and/or store cards
- Loans
- Items on finance (sofas, electricals, cars etc.)

Benefits

Regular payments and subscriptions

Significant possessions

- Property
- Vehicles

Accounts

Current account(s)

Bank / building society

Name(s) the account is held in

Bank / building society

Name(s) the account is held in

Bank / building society

Name(s) the account is held in



Savings

Bank / building society

Name(s) the account is held in

Bank / building society

Name(s) the account is held in

Investments

Provider

Name(s) the account is held in

Contact details

Provider

Name(s) the account is held in

Contact details

Shares

Company name

Certificate is held in

Company name

Certificate is held in



Pensions

Defined contribution (money purchase)

Company

Phone number Reference number

Documents held in

Company

Phone number Reference number

Documents held in

Defined benefit (final salary)

Company

Phone number Reference number

Documents held in

Company

Phone number Reference number

Documents held in

Private Pension

Company

Phone number Reference number

Documents held in

State Pension

I am claiming state pension Yes No

Annuity

Provider name

Policy number



Borrowing

Mortgage

Lender

Name(s) the account is held in

Credit card / store card

Issuer

Card number

Name(s) the account is held in

Issuer

Card number

Name(s) the account is held in

Loans

Loan provider

Phone number

Documents held in

Name(s) the account is held in

Items on finance (for example, car, or furniture)

Items bought on finance

Financing company

Contacts

Documents held in

Items bought on finance

Financing company

Contacts

Documents held in



Insurances

Life insurance

Provider

Policy number

Contacts

Documents held in

Home insurance (Contents insurance)

Company

Renewal date

Policy number

Contacts

Documents held in

Home insurance (Buildings insurance)

Company

Renewal date

Policy number

Contacts

Documents held in

Car Insurance

Company

Renewal date

Policy number

Contacts

Documents held in

Company

Renewal date

Policy number

Contacts

Documents held in



Utilities

Gas

Provider	Account number	Contacts
<input type="text"/>	<input type="text"/>	<input type="text"/>

Electricity

Provider	Account number	Contacts
<input type="text"/>	<input type="text"/>	<input type="text"/>

Water

Provider	Account number	Contacts
<input type="text"/>	<input type="text"/>	<input type="text"/>

Broadband

Provider	Account number	Contacts
<input type="text"/>	<input type="text"/>	<input type="text"/>

TV

Provider	Account number	Contacts
<input type="text"/>	<input type="text"/>	<input type="text"/>

Mobile

Provider	Account number	Contacts
<input type="text"/>	<input type="text"/>	<input type="text"/>

Local Council

Name	Account number	Contacts
<input type="text"/>	<input type="text"/>	<input type="text"/>

Benefits

Use the space below to list any benefits that you currently receive:

Regular payments and subscriptions

Many of us will have a number of regular payments or subscriptions, whether it's for Netflix, charitable contributions, magazine subscriptions or a contact lense order.

Use the space below to list any regular payments or subscriptions you have, the company that provides it, their contact detail and the payment type (standing order or direct debit)



Significant possessions

Use this section to outline anything you own that has significant financial value. This will help whoever you've assigned as Executor to understand the value of your estate and whether you might need to pay any Inheritance Tax.

Property

Address of the property

Deed held in

Address of the property

Deed held in

Vehicles

Make

Model

Registration

Tax renewal date

Make

Model

Registration

Tax renewal date

Valuable items

This could be anything from jewellery to antiques, art or electronics. Use this section to list any items, give a rough idea of their value and where you keep them.

Other financial notes and information

Use this section to add any extra information you think is important concerning your finances that didn't fit in the earlier sections, or wasn't covered.

Use this section to make any notes you think might be important or useful for your loved ones.



**Navigating your wealth.
Made simple.**