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Important documents list



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WHERE TO FIND EVERYTHING

important documents

Legal and identity

Wills: location _____

Passports: location _____

Birth certificates: location _____

Marriage / civil partnership certificate: location _____

Power of attorney: location _____

Finance

Bank accounts: institution(s) _____

ISAs / savings: institution(s) _____

Pension(s): provider(s) _____

Investments: provider(s) _____

Life insurance: provider ____ Policy no. ____

Property and home

Deeds or tenancy agreement: location _____

Buildings insurance: provider ____ Policy no. ____

Contents insurance: provider ____ Policy no. ____

Boiler / appliance warranties: location _____

Trusted contacts

Solicitor: name ____ Phone _____

Accountant: name ____ Phone _____

Financial adviser: name ____ Phone _____

Executor of will: name ____ Phone _____