Important Accounts & Details

A companion to Just in Case: A Couple's Guide to Wishes, Plans & Peace of Mind

This form is for the details that are too sensitive to write in your book, such as account numbers and sort codes. Fill it in on your computer, or print it and write by hand. It works in Adobe Acrobat Reader, Preview on a Mac, and most PDF apps.

Please keep it safe

- Never email this file, upload it to a website, or leave it in a shared folder.
- Do not write passwords or PINs in it. Use a password manager, and note where it is kept.
- Password-protect the file, or print it and keep the paper somewhere safe. Steps are at tawebooks.co.uk/downloads.html
- Keep the password separately, and tell your executor where to find both.

About this record

Name(s)

Date completed

Last updated

Where the printed book is kept

Who knows where this file is kept

Where a copy is stored (e.g. solicitor, safe)

This form is a record-keeping tool, not legal, tax or financial advice.

Bank & building society accounts

Include current, savings and joint accounts

BANK / PROVIDER	ACCOUNT TYPE	SORT CODE	ACCOUNT NUMBER	JOINT? WITH WHOM

Savings, investments & pensions

Savings, ISAs & investments

PROVIDER	TYPE	ACCOUNT / REFERENCE	NOTES

Pensions

PROVIDER	TYPE	REFERENCE	NOTES

Insurance, property & vehicles

Insurance & other policies

INSURER / PROVIDER	TYPE	POLICY NUMBER	CONTACT / NOTES

Property & vehicles

ITEM	DETAILS	WHERE THE PAPERS ARE

Where things are kept

And who to contact

Will: where the original is kept

Solicitor or will writer holding it

Lasting powers of attorney

Property deeds

Passports and birth certificates

Safe or key location

Password manager (which one, not the password)

Who can unlock my phone or computer

People to contact

NAME	ROLE (SOLICITOR, EXECUTOR…)	PHONE	EMAIL