Organising your financial affairs

This document can be used to help you organise your financial affairs, ensuring you have your adviser's details and other important information collated in one place.
NB: Please remember to update this document as your circumstances change.

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THE THOUGHTFUL INVESTOR

Client details

Client One:

Date of birth:

NI no:

Tax Reference:

Address:

Postcode:

Client Two:

Financial adviser details

Contact my financial adviser below for information on my savings, investment and pensions. They may be able to provide information on any assets exempt from inheritance tax and gifting made.

Name of Financial Advice Firm:

Castlefield Investment Partners LLP

Name of Adviser:

Email of Adviser:

Address of Financial Advice Firm:

Castlefield Investment Partners LLP
8th Floor
111 Piccadilly
Postcode: M1 2HY

Solicitor details

Name of Solicitor Firm:

Name of Solicitor:

Email of Solicitor:

Address of Solicitor Firm:

Postcode:

Accountant details

Name of Accountancy Firm:

Name of Accountant:

Email of Accountant:

Address of Accountancy Firm:

Postcode:

Details of where my will is held

Executor:

Executor:

Details of Power of Attorney

Name of Attorney:

Email of Attorney:

Registered:

Address of Attorney:

Postcode:

Information on any credit cards or loans

ORGANISATION	ACCOUNT REFERENCE	JOINT/SINGLE

Miscellaneous e.g. organisations, clubs, charities

ORGANISATION	ACCOUNT REFERENCE	JOINT/SINGLE

Utilities

UTILITY PROVIDER	ACCOUNT REFERENCE	JOINT/SINGLE

Funeral Arrangements

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