fiducia

wealth management & wealth preservation

fiduciawealth.co.uk

WHAT I OWN & WHERE I KEEP IT

Chartered
Financial
Planners

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This document is to help you manage your affairs should you lose your mental capacity or for others to use in the unfortunate circumstances you pass away unexpectedly.

Your Name

Address

NI no. D.O.B.

Tax reference

Spouse/partner name

Address

NI no. D.O.B.

Tax reference

Name of financial adviser/company

Address

Contact no

Email

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Name of Solicitor/Company

Address

Contact no

Email

Name of Accountant/Company

Address

Contact no

Email

Where is my *Will* held

Dated

Executor 1

Executor 2

Executor 3

Executor 4

Medical Contact

Additional information such as medical research bequests, deeds, trusts, safety deposit box access, computer codes, phone pin.

Power of Attorney

There are two main types of lasting power of attorneys available in the UK: Health & Welfare and Property & Financial Affairs, please add details below

Health & Welfare	Name & address of Attorneys	Registered Yes/No
Property & Financial Affairs	Name & address of Attorneys	Registered Yes/No

Fiducia Wealth Management Ltd, Dedham Hall Business Centre, Brook Street, Dedham, Colchester Essex CO7 6AD

Bank accounts (single & joint)

Bank name/address	Sort code	Account no.	Single or Joint

Credit cards

Name of credit card company	Account no.

Mortgages/Equity Release/Loans

Company	Account no

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My pension

Provider (plus name of any platform)	Latest plan value £	Plan no.	Is it paying you an income? Yes/No

Notes

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Gifts made in the last seven years

Please include any Potentially Exempt Transfers (PETs) plus any 'surplus income' gifts made

Date	Amount and/or asset	Recipient	Documentation e.g. trust deed, letter

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Beneficiary contact information

Name

Address

Contact information

Name

Address

Contact information

Name

Address

Contact information

Name

Address

Contact information

Additional information e.g. where items listed in this document are stored

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Funeral arrangements

What type of service would you like

Cremation Yes/No

If you plan on cremation, would you like your ashes scattered? Where would you like them scattered?

Burial Yes/No

Location of cemetery or crematorium

Location for any church or funeral service

Any other funeral arrangements or wishes?

Are there any people you do not wish to be notified of your death? Please list below

Are there any people you do not wish to have at your funeral? Please list below

Other things to attach:

Will ✔
Power of Attorney ✔
Copy of any certificates ✔
Latest valuations ✔
Record of gifts ✔

Signed

Dated

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Notes

Please use this page to add any further information should you require additional space to add details about your assets/beneficiaries. Be sure to title them e.g. Beneficiaries contact information continued.

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Fiducia Wealth Management is a well established multi-award winning firm of Chartered Financial Planners with a proven track record of delivering outstanding wealth management and financial advice to private clients, business owners, family estates, charities, pension funds and trustees on tax, investments and financial planning.

Our offices are in Dedham on the Essex/Suffolk border and in Chelmsford.

We provide our expertise to a diverse range of clients throughout the East of England, London and the UK nationwide.

Integrity, openness and transparency are our core values and we recognise that no two clients requirements, situations and objectives are the same – our solutions are therefore bespoke to help you meet your financial goals and later life needs in the most tax efficient way.

Head Office: Dedham Hall Business Centre,
Brook Street, Dedham, Colchester Essex CO7 6AD
Telephone: +44 (0)1206 321045

Chelmsford Office:
Saxon House, 27 Duke Street, Chelmsford,
Essex CM1 1HT Telephone: +44 (0)1245 950922