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| --- | --- |
| **Finance - list what applies to you** | **Contact Details/Action** |
| Accountant |  |
| Bank/Building Society Current Accounts |  |
| Cash - ready cash e.g. what amount, where kept |  |
| Credit / Debit Cards |  |
| Creditors |  |
| Debtors |  |
| Housing Benefit |  |
| Savings Accounts |  |
| Stocks & Shares / Bonds |  |
| Trusts/Discretionary Trusts / Deeds of Covenant |  |
|  |  |
| Income - from employment |  |
| Income - from Re-mortgaging |  |
| Income - Benefits – what benefits, DWP/Benefits Office |  |
| Income - Continuing Health Care (CHC) /Personal Health  Budget (PHB) |  |
| Income - Direct Debits |  |
| Income - National Savings Certificates, Premium Bonds |  |
| Income - Other e.g. Overseas Income / Pensions |  |
| Income - Pension / Pension Providers |  |
| Income Tax / Inland Revenue / HMRC |  |
| Legacies |  |
| Outgoings e.g. Endowment Policies |  |
| Outgoings e.g. Loan Finance |  |
| Outgoings e.g. Local Authority - Council Tax |  |
| Outgoings e.g. Mortgage - Mortgage holder Name |  |
| Outgoings e.g. Rent |  |
| Outgoings e.g. Standing Orders |  |
| Outgoings e.g. Subscriptions/Memberships |  |
|  |  |
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| --- | --- |
| Insurances - list those relevant to you | Contact Details/Action |
| Funeral Finances (Name of Policy if relevant) |  |
| Hospital Plans |  |
| Household/Buildings |  |
| Household/Contents |  |
| Household/Extra |  |
| Life Insurance (Name) |  |
| Medical Insurance |  |
| Vehicle Insurance |  |
| Health Insurance |  |
|  |  |