



A RECORD OF IMPORTANT INFORMATION
THAT WILL HELP YOUR FAMILY, EXECUTORS,
OR LOVED ONES MANAGE YOUR AFFAIRS IF
SOMETHING HAPPENS TO YOU



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for the Ladies of Law community

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Associate Partner Practice

**St
James's
Place**

THIS BOOK IS DESIGNED TO HELP YOU
KEEP TRACK OF ALL YOUR IMPORTANT
INFORMATION AND RELEVANT ASSETS.

THE DEATH OF A CLOSE FAMILY
MEMBER OR FRIEND IS ALWAYS A
DIFFICULT TIME FOR THOSE LEFT
BEHIND.



IT CAN BE MADE MORE DIFFICULT FOR
THE EXECUTORS WHO HAVE BEEN
ASKED TO HANDLE THE ESTATE, IF THEY
CAN'T FIND KEY DOCUMENTS THAT
BELONGED TO THE DECEASED.



FOR THE DAY I CAN'T BE HERE...



NOTES TO MY LOVED ONES



Personal Details

FIRST NAME:

SURNAME:

DATE OF BIRTH:

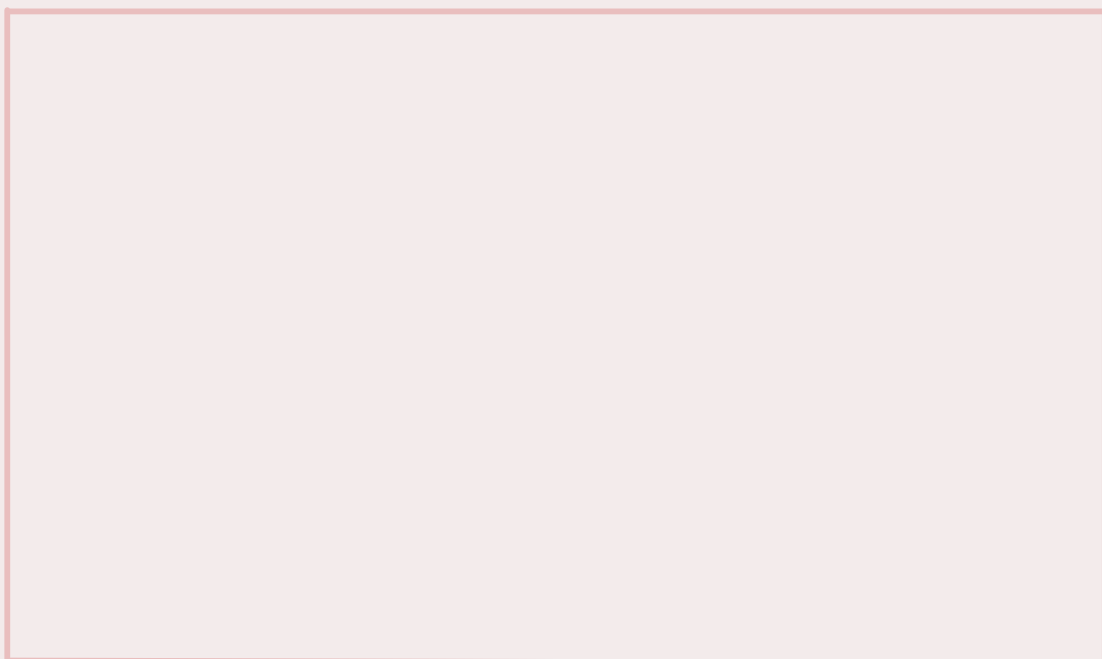
NATIONAL INSURANCE NO:

NHS NO:

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MY BENEFICIARY CONTACT DETAILS

NAMES & ADDRESS



Where you are providing us with personal data about another individual you agree to inform them that you are providing their information to us and will refer them to the privacy policy available at www.sjp.co.uk/privacy.



Key Contacts



CONTACT	NAME / ADDRESS
FINANCIAL ADVISER:	
SOLICITOR:	
ACCOUNTANT:	
DOCTOR:	
EMPLOYER:	
OTHERS:	

MY WILL

The original of my Will is held with:

The Will is dated:

The Will was drawn up by:

My executors are:

My beneficiaries are:

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POWERS OF ATTORNEY

DATE MADE	NAME / ADDRESS OF ATTORNEY	HEALTH & WELFARE LPA OR FINANCIAL LPA?	REGISTERED? Y/N	NAME/ ADDRESS OF INDIVIDUALS TO BE NOTIFIED OF ANY APPLICATION TO REGISTER THE EPA/LPA

CLAIMING THE TRANSFERABLE NIL RATE BAND

WHEN SOMEONE WHO HAS BEEN PREVIOUSLY MARRIED OR IN A CIVIL PARTNERSHIP DIES, A CLAIM CAN BE MADE TO TRANSFER THE NIL RATE BAND, WHERE ANY PART OF IT WAS UNUSED, FROM THE SPOUSE OR CIVIL PARTNER WHO DIED FIRST. THE FOLLOWING DOCUMENTS WILL BE NEEDED IN SUPPORT OF SUCH A CLAIM. PLEASE USE THIS SECTION TO RECORD THEIR LOCATION.

COPY OF GRANT OF REPRESENTATION (CONFIRMATION IN SCOTLAND) OF DECEASED SPOUSE/CIVIL PARTNER:

WILL OF DECEASED SPOUSE/ CIVIL PARTNER:

ANY DEED OF VARIATION OR DISCLAIMER EXECUTED IN RESPECT OF PROPERTY INHERITED FROM A DECEASED SPOUSE / CIVIL PARTNER:

DEATH CERTIFICATE OF DECEASED SPOUSE/CIVIL PARTNER:



BANK/BUILDING SOCIETY ACCOUNTS (INCLUDING ONLINE ACCOUNTS):

Bank/Building Society (name and address of branch)	Sort Code	Account No	Contact

CREDIT CARDS (INCLUDING ONLINE ACCOUNTS):

Credit Card Company	Account No	Contact



LOANS:

Company	Account No	Contact



MY ASSETS:

Investment Bonds/Unit Trusts	Investment Detail	Plan No / Account No	Contact



ISAs	Investment Detail	Plan No / Account No	Contact



MY ASSETS:

Savings and Life Assurance Plans	Investment Detail	Plan No / Account No	Contact



Stocks and Shares	Investment Detail	Plan No / Account No	Contact



MY ASSETS:

Other Assets E.g. Premium Bonds/National Savings	Investment Detail	Plan No / Account No	Contact



Comments/Notes



MY PENSIONS:

Provider (Name and Address)	Latest Plan Value	Plan No.	Contact



Comments/Notes



MY ASSETS:

Type	Address	Approx. value	Ownership	Outstanding Loan
Main Residence				
Other Property				



Comments/Notes



GIFTS MADE DURING LIFETIME:

Date	Amount and/or Asset	Recipient of Gift



Comments/Notes



MISCELLANEOUS INFORMATION:

Details of organisations and clubs:

Name	Membership No.	Contact

Other contacts (utility companies, general insurance, subscriptions)

Name	Account / Membership No.	Contact



Additional information - e.g. Where items are stored



MY FUNERAL WISHES

THE DEATH OF SOMEONE CAN BE A TIME OF GREAT STRESS, AS WELL AS DISTRESS, FOR THE BEREAVED. WE CAN LESSEN THE STRESS FOR THOSE WE LEAVE BEHIND BY MAKING OUR WISHES KNOWN BEFOREHAND.

COMPLETE THE QUESTIONS BELOW TO HELP CLARIFY THOSE WISHES TO YOUR LOVED ONES.

Do you want a burial, cremation, or another option?

If burial:

Preferred cemetery?

Do you already own a plot?

What clothing or items would you like to be buried with?

If cremation:

Preferred location for ashes (scattered, kept by family, interred)?

Do you want an urn selected in advance?

Other wishes:



MY FUNERAL WISHES

Funeral or Memorial Service

Do you want a funeral, memorial, celebration of life, or no service at all?

Location (funeral home, place of worship, home, outdoors, etc.)

Type of service (religious, secular, themed, simple, formal, etc.)

Officiant or person to lead the service?

Music preferences (songs, performers, live vs. recorded)?

Readings, poems, or scripture?

Eulogist(s)? Anyone you'd like to speak?

Attire preferences for guests?

Flowers, donations, or other tributes?

Open casket or closed?

Post-Funeral

Preferred gathering after the service (location, tone, food?)

Instructions for digital accounts (social media, email)

Pets and dependents – who will care for them?

Any guidance on estate, belongings, or keepsakes?



MY FUNERAL WISHES

Any further wishes or requests



MY FAMILY TREE

Name



Spouse/Partner

Parents

Grandparents

Children

Brothers & Sisters

Key Notes / Other Connections



SERVICES FOR INDIVIDUALS:

Pensions:

- Pensions and Retirement Planning
- Cashflow Modelling to give you clarity on when you can retire

Insurance:

- Life, Critical Illness and Income Protection products
- Private Medical Insurance

Investments:

- ISAs and Investments
- Bonds
- Life Planning & Goal Setting

Other:

- Wills, Probate and Power of Attorney*
- Equity Release**
- Mortgages

Your home may be repossessed if you do not keep up repayments on your mortgage.

The value of an investment with St. James's Place will be directly linked to the performance of the funds you select and the value can therefore go down as well as up. You may get back less than you invested.

*Will writing and Powers of Attorney involve the referral to a service that is separate and distinct to those offered by St. James's Place and are not regulated by the Financial Conduct Authority.

**This is a lifetime mortgage or home reversion plan. To understand the features and risks associated with such products, please ask for a personalised illustration.

Email rebecca.bidwell@sjpp.co.uk to arrange a no obligation audit



SERVICES FOR BUSINESSES:

Looking after workforce:

- Group Health Insurance / Private Medical Insurance
- Group Death in Service
- Financial Education

Managing Business Risk:

- Key Person Insurance
- Shareholder Protection
- Succession Planning

Investing:

- Pensions
- Tax Planning
- Corporate Investing
- Capital Extraction
- Cash Management

Business Growth and Exit:

- Growth Planning and Exit Advice
- Retirement Planning
- CGT Planning

The value of an investment with St. James's Place will be directly linked to the performance of the funds you select and the value can therefore go down as well as up. You may get back less than you invested.

The levels and bases of taxation, and reliefs from taxation, can change at any time.

The value of any tax relief is generally dependent on individual circumstances.

Email rebecca.bidwell@sjpp.co.uk to arrange a no obligation audit

Please note that advice with regard to exit strategy planning may involve the referral to a service that is separate and distinct to those offered by St. James's Place.



ABOUT QUEENSBURY

This booklet has been brought to you by Queensbury Financial Advisers for the Ladies of Law community.

At Queensbury we are passionate about helping people take control of their financial future and achieve their personal and professional goals.

We created Queensbury to provide a more personal, relationship-led alternative in financial advice. A relationship that puts clients first and delivers meaningful support at every stage of life.

We are here to offer clear advice, listen without judgment, and build trusted, long-term relationships with clients who value integrity and straight-talking expertise.



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