

**PERSONAL ASSET LOG**

**Client Details**

|  |  |
| --- | --- |
| **Name** |  |
| **Address** |  |
| **Date of birth** |  |
| **National Insurance Number** |  |
| **Solicitor Details** |  |
| **Accountant Details** |  |
| **Date of marriage / civil partnership** |  |
| **Location of Will** |  |
| **Date of Will and any Codicils** |  |
| **Funeral / Burial requests** | **Please ensure that all funeral / burial requests have been notified to your next of kin and / or family members** |
| **Power of Attorney Details** |  |
| **Organ donation requests** | **Please ensure that all organ donation requests have been notified to your next of kin and / or family members** |

**PLEASE NOTE THAT THE PERSONAL ASSET LOG IS NOT INTENDED TO BE A WILL. THERE ARE ADDITIONAL LEGAL REQUIREMENTS FOR THE CREATION OF A WILL.**

**Bank or Building Society Accounts**

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| --- | --- | --- |
| **Organisation** | **Description of holding and account number** | **Value** |
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**Property**

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| --- | --- | --- | --- | --- |
| **Address** | **Mortgage** | **Location of Deeds** | **Held Solely or Jointly** | **Value** |
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**Investments and Savings**

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| **Organisation** | **Description of holding and account number** | **Value** |
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|  |  |  |
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**Shareholdings**

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| --- | --- | --- |
| **Organisation** | **Description of holding and amount of shares held** | **Value** |
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**Pensions, Life Insurance and Death Benefits**

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| --- | --- | --- |
| **Organisation** | **Description** | **Value** |
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**Foreign Assets**

|  |  |
| --- | --- |
| **Description** | **Value** |
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**Valuable Personal and Household Items**

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| --- | --- |
| **Item** | **Value** |
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**Cars**

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| --- | --- |
| **Description** | **Value** |
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**Safety Deposit Box**

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| --- | --- |
| **Location** | **Contents** |
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**E-mail Accounts**

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| --- | --- |
| **Provider** | **Address** |
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**Digital Photographs, Videos and Music**

|  |  |
| --- | --- |
| **Location of Storage** | **Specific wishes on how to be dealt with** |
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**Social Media**

|  |  |  |
| --- | --- | --- |
| **Provider** | **User name or profile name** | **Specific wishes on how to be dealt with** |
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**Shopping and auction accounts**

|  |  |  |
| --- | --- | --- |
| **Provider** | **User name** | **Value** |
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**Loyalty Scheme**

|  |  |  |
| --- | --- | --- |
| **Provider** | **User name** | **Value** |
|  |  |  |
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**Gambling Accounts**

|  |  |  |
| --- | --- | --- |
| **Provider** | **User name** | **Value** |
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**Bitcoin**

|  |  |
| --- | --- |
| **User name** | **Value** |
|  |  |
|  |  |

**Computer Game**

|  |  |  |
| --- | --- | --- |
| **Game** | **User name / Avatar** | **Value** |
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**Other Assets**

|  |  |  |
| --- | --- | --- |
| **Organisation** | **Description** | **Value** |
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**Signed:**

**Date:**

**Explanatory Notes**

The Personal Asset Log has been produced by the Non Contentious Business Committee of the Law Society of Northern Ireland with the intention of being an aide to solicitors who are taking instructions for a will or for solicitors to give to clients to retain within their own papers and update themselves from time to time. The Personal Asset Log is not intended to be a definitive list of all assets and solicitors should make further enquiries from the client if required in relation to any other assets. The Personal Asset Log is not intended to be a will and there are additional legal requirements for creation of a will.

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