

Helpful Notes for my Executors

To my Executor,

Thank you for agreeing to take on the role of my Executor. To make your job as easy as possible I have completed this form to act as guidance when attending to matters after I have gone such as registering my death, organising my funeral and sorting my financial affairs.

This is not a legal document but should be considered more of a helpful guide. My solicitor recommends that I place this document with the copy of my Will.



My Personal Details

Full name:	Other names I am known by:
Full Address:	
Date of birth:	Place of birth:
Marital Status:	Occupation:
Full name of spouse/former spouse:	Occupation of late husband (if a widow):
Fathers full name:	Mothers full name:
Doctors name (GP):	Telephone number (GP):
Doctors Address:	
National Insurance number:	NHS number:
Income Tax Office:	Tax Reference:
You will find my Keys (House, car, garage, safe, etc.) in the places listed below:	
Location of original Will & Codicil(s):	

Date form completed

About my Funeral Arrangements

My wishes in relation to my funeral arrangements are set out here:

Contact details of my preferred Undertaker:		
<input type="checkbox"/> Cremation	Ashes interred or scattered	Location
<input type="checkbox"/> Buried	Final Resting Place	Location of burial plot deeds
My other directions such as religious preferences, whether the ceremony should be limited to close family and friends, hymns, location of funeral wake, preferences for flowers (e.g. family flowers only), charitable donation (e.g. In lieu of flowers) descriptions for memorials, any directions about announcement of my death in the newspaper etc.		

People who should be notified about my death

Name	Address, telephone number and email address

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My Key Advisors

Financial Advisor	Stockbroker
Name:	Name:
Address:	Address:
Tel:	Tel:
Accountant	Property Manager
Name:	Name:
Address:	Address:
Tel:	Tel:

My Financial Details

Name and Address	Type of account	Account number	Sort code

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Details of my other assets: National savings and investment products, Life Assurance, Annuity policies (name of company and policy number) or Pension schemes of which I am or have been a member (scheme name and reference number), details of any valuables (e.g. jewellery, antiques, family heirlooms etc), other property.

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Details of my liabilities: Such as mortgage or other loan (including credit agreement, store or credit cards): the name of the lender and my account number

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Details of any Trust of which I am a beneficiary: I detail below the name of the trust and contact details for the Trustees below of any trust or settlement that I receive income from:

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Where to Find My Important Papers

Title deeds for house/flat, etc.	
Birth and/or Marriage certificate	
Car log book and insurance certificate	
Safe deposit box	
National Savings investments	
Stocks and Share certificates	
Life Assurance policies	
Pension documents	
House Insurance policies	
Income Tax papers	
Utility bills	
Receipts/guarantees	

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About Us

We deliver excellent legal services with a human touch and are proud to have a reputation for being approachable and going the extra mile for our clients. We provide high quality, pragmatic advice and offer a comprehensive range of legal services, delivered by experts and supported by our culture of respect and understanding.

At Band Hatton Button, our goal is simple we want to help safeguard and enhance the wealth of our clients. We deliver a service that allows clients to protect, develop and ultimately pass on their wealth to their chosen beneficiaries with complete peace of mind.

When Someone Dies

We recognise that dealing with the legalities following a death in the family can be difficult. We can help to guide the personal representatives through the process, explaining what steps need to be taken and how the deceased person's estate will pass, either under the Will or under the intestacy rules (if they did not leave a Will).

We can assist with all aspects of probate and the administration of estates. We have extensive experience in dealing with high value and complex estates. We can also help to maximise tax savings for the estate and its beneficiaries.

We can provide all the expert advice, assistance and reassurance necessary to make the process as straightforward as possible. We understand that dealing with these issues can be difficult and emotional, which is why we treat every case with sensitivity and care, and provide straightforward and practical advice.

For individual advice and assistance contact our Wills, Probate and Trusts Team to find out how we can help.

Our expertise includes:

- Wills, estate and succession planning
- Powers of Attorney and Court of Protection
- Administration of estates and post death planning
- Trust creation and administration
- Will disputes
- Matrimonial and family law
- Buying or selling a property



Michelle Gavin TEP, Charlotte Macalister TEP, Lisa Moseley TEP and Keri Wood TEP are the full members of the Society of Trust and Estate Practitioners (STEP) at Band Hatton Button LLP

Michelle Gavin TEP, Lisa Moseley TEP, Charlotte Macalister TEP and Keri Wood TEP are the full members of the Solicitors for the Elderly (SFE) at Band Hatton Button LLP

NHS Organ Donation Register Reminder:

Since 20 May 2020 Organ Donation in England has changed to an 'Opt Out' system. If organ donation is not something that is for you then record your decision on the NHS Organ Donor Register and let your family and friends know what you have decided.

More information can be found on <https://www.organdonation.nhs.uk> or by calling the NHS Donor Helpline on 0300 303 2094.