



MY DOCUMENTS LOCATOR

A checklist of personal documents and other useful information

My Document Locator (MDL) is intended to facilitate the location of important documents and information in the event of death or incapacity. Its only purpose is to address the practical difficulties of coping with financial queries at a time when close relatives may be distressed.

MDL is not a Will and should not be regarded as such. It should not contain instructions about what should be done with your money or possessions. It is simply a record of where your key personal records, assets and papers can be located. If you have not made a Will, you are advised to consider doing so.

It is suggested that a responsible adult is made aware of the existence/location of this record and/or a copy should be given to a close relative/executor as a precaution against a common calamity. It is important that the record be kept up to date.

The MDL is set out as follows:

Section 1: Key Information

- a. What you may need immediately
- b. Details of my Will
- c. My professional advisors

Section 2: Personal Finances

- a. My life assurance, pensions and other related policies
- b. My home
- c. Other property and investments
- d. My car
- e. My bank and similar accounts
- f. My plastic cards, loans and liabilities

Section 3: Business Matters

- a. My business/employment
- b. My tax details
- c. Other information

Name:	
Address:	
Date prepared:	

Emergency contacts				
Name	Address	Telephone	Email	Relationship

Section 1

Key Information

1a. What you may need immediately	
My deed/safe box may be found:	
The key is kept:	
And the key number is:	
I have/do not have a private healthcare policy with:	
This is/is not a company scheme:	
The policy document may be found:	
I do not take medication.	
I currently take the following prescribed medication:	
I do/do not have a Living Will.	
This may be found:	
I do/do not have a donor card/medical research bequests.	
These may be found:	
My birth/marriage certificates and other similar documents may be found:	
I do/do not have (prepaid) funeral arrangements made.	
These can be found:	
I do/do not have a lair.	
The deeds may be found:	
My clergyman is:	
Name:	
Address:	
Telephone:	
Email:	
My physician is:	
Name:	
Address:	
Telephone:	
Email:	



Section 1

Key Information

1b. Details of my Will	
The original of my Will is held by/may be found at:	
A copy of my Will may be found:	
My Will is dated:	
There is no Codicil/Codicils are dated:	
My Will was prepared by:	
Name:	
Company:	
Address:	
Telephone:	
Email:	
Executor(s) to my Will are:	
1c. My professional advisors	
My professional advisors are:	
Solicitor	
Name:	
Address:	
Telephone:	
Email:	
Accountant	
Name:	
Address:	
Telephone:	
Email:	
Stockbroker	
Name:	
Address:	
Telephone:	
Email:	
Other	
Name:	
Address:	
Telephone:	
Email:	



Personal Finances

My life assurances, pensions, disability and personal accident policies etc are listed below:

[illegible]

Section 2

Personal Finances

2b. My home	
My main residence is at:	
I am a sole/joint owner with:	
Name:	
Address:	
Telephone:	
* I do not have a mortgage./* I have a mortgage with:	
Company name:	
Address:	
Telephone:	
Mortgage reference number:	
The title deeds may be found:	
* I do not have building insurance./* I have building insurance with:	
Company name:	
Address:	
Telephone:	
The policy number is:	
And the policy may be found:	
* I do not have home contents insurance./* I have home contents insurance with:	
Company name:	
Address:	
Telephone:	
The policy number is:	
And the policy may be found:	

* Delete as required.



Section 2

Personal Finances

2c. Other Property & Investments

* I am a sole/joint owner of the following properties:

Describe the property
(eg, flat, caravan, timeshare):

* The joint owner is:

Name:

Address:

Telephone:

* There is a loan/mortgage with:

Name:

Address:

Telephone:

The loan/mortgage reference number is:

The title deeds may be found:

* The asset is not let commercially./* The asset is commercially let to:

Name:

Address:

Telephone:

The lease and other documentation may be
found:

My investment register/schedule of
investments may be found:

My investment certificates may be found:

* Delete as required.



Section 2

Personal Finances

2d. My car	
My car is/is not a company vehicle.	
The registration document/MOT certificate may be found:	
My car is insured by:	
Name:	
Address:	
Telephone:	
The policy number is:	
The policy may be found:	
The insurance certificate may be found:	
My car is subject to a Loan/Finance/HP agreement	
The agreement is with:	
Name:	
Address:	
Telephone:	
The agreement number is:	
The agreement may be found:	
My investment register/schedule of investments may be found:	
My investment certificates may be found:	



Section 2

Personal Finances

2e. My bank and similar accounts

I have the following accounts with the banks and financial institutions stated below.

Bank/Institution Name:			
Address:			
Telephone:			
	Type of account	Account number	Sole/Joint with
1			
2			
3			
Bank/Institution name:			
Address:			
Telephone:			
	Type of account	Account number	Sole/Joint with
1			
2			
3			
Bank/Institution name:			
Address:			
Telephone:			
	Type of account	Account number	Sole/Joint with
1			
2			
3			



Section 2

Personal Finances

2e. My bank and similar accounts (continued)

I have the following standing order/direct debit arrangements as noted below.

Bank	Account number	Payee	Amount (£)	Purpose
Passbooks and statements may be found:				

2f. My plastic cards, loans and liabilities.

I have the following plastic cards

Issuer	Telephone number	Card number (last four digits)	Expiry date
I keep these in my purse/wallet or they may be found:			

I have the following loans, not included elsewhere in this document:

Issuer	Telephone number	Card number (last four digits)	Expiry date
The documentation for these may be found:			



Section 3

Business Matters

3a. My business/employment	
* I am an owner of/director of/partner in:	
Business name:	
Address:	
Telephone:	
Contact name:	
* I am employed by:	
Business name:	
Address:	
Telephone:	
Contact name:	
Payroll/Works number:	
* I am/am not a member of a company pension scheme.	
The pension scheme documentation may be found:	
* Death in service benefit does not apply/ applies at the level of:	
Details of other business interests:	

* Delete as required.



Section 3 Business Matters

3b. My tax details

The tax office that deals with my affairs is:

Name:	
Address:	
Telephone:	
My reference number is:	
My national insurance number is:	

* I do not have any tax advisors.

* My tax advisors are:	
Address:	
Telephone:	

For inheritance tax purposes details of gifts made are held by my accountant/solicitor or are detailed below:

Date	Asset	Donee

* Delete as required.



Section 3

Business Matters

3b. Other details

This page can be used to provide supporting information for items on earlier pages, such as schedule of investments or to list other details such as membership of associations, clubs and societies, trusteeships etc.

