

Estate inventory

Whether you are making a will or have been appointed as an executor, administrator or attorney, an inventory of the estate can help ensure nothing is missed. The list below is a useful place to start.



It's important to keep all personal information safe and secure. If you draw up an inventory list, make sure you encrypt it or keep it locked away.

Please note this is not an exhaustive list, it's only a guide and does not constitute legal advice.

Personal information



1. Identity and family

- Full name (and any previous names and aliases)
- Address
- Date of birth
- National Insurance number
- Marital status and name of spouse/civil partner if applicable
- Names of children, if applicable
- Are any of the children from a previous relationship?

2. Is there a will?

If yes:

- Where is it stored?
- What is the executor's name, address, phone number?

3. Is there a funeral plan?

- If yes, who is this with? What is the reference number?
- If no, are there any specific funeral wishes?

4. Are there any tax planning measures in place? If yes, provide details

5. Have any gifts worth over £3,000 been made in the last 7 years, or are there any plans to do so?

If yes:

- Who is the recipient?
- What is the gift?
- What is the value of the gift?
- When was it / will it be gifted?

Income



1. Is a salary being received?

If so:

- Who is paying the salary?
- How much is the salary?
- Is income tax deducted via PAYE?

2. Is there a pension?

If so:

- What type of pension is it?
- Name of pension provider
- Pension roll number
- Is the pension currently being paid out? If not, is there a lump sum due?

3. Is a dividend / investment income being received?

If so:

- Details of investment
- Amount invested / amount of income
- Account / reference number

4. Are there any other incomes (trust, rental income, etc)?

If so:

- Type of income
- Amount of income
- Any other relevant information (income source, reference numbers, etc.)

Assets



1. Property

- Property address
- How is it owned? (solely / jointly as joint tenants / jointly as tenants in common)
- If the property is owned jointly, who is the other owner? (name, address, phone number)
- Is the property registered?
- Is the property a main residence / a tenanted rental property / other?

2. Bank accounts

- Name of bank / building society
- Account number
- Name of any joint account holders
- Approximate balance

3. Life insurance policy

- Name of insurance provider
- Policy number
- Named beneficiaries on the policy

4. Shares and investments

- Type of share / investment (i.e. cash / stocks / unit trust)
- Share registrar / investment holder
- Applicable reference numbers / details
- Value of shares

5. Business / agricultural assets

- Type of asset
- Address (if applicable)
- Value of assets

6. Digital assets and online accounts (including email accounts, subscriptions, social media and retail)

- Location of the account (i.e. the website / service provider)
- Value of account (if any)
- Username and password (if the account holder is comfortable with this being shared and it doesn't infringe on the terms and conditions of the website)

Some websites allow account holders to grant someone access to the account in the event that the account holder dies or becomes unable to access the account. Facebook has an option to appoint a 'legacy contact' and Google has an Inactive Account Manager feature, where a trusted person can be nominated to access certain information after a specified period of inactivity.

7. Other assets (i.e. antiques, collectables, etc.)

- Details of the asset
- Location of the asset
- Reference numbers and any other relevant information

Debts / liabilities



1. Mortgage(s) in your name

- Name of mortgage provider
- Mortgage account number
- If it's a joint mortgage, details of the other person
- Outstanding amount on the mortgage

2. Credit cards

- Credit card company
- Credit card account number
- Approximate balance
- Location of the credit card

3. Loans

- Name of creditor
- Account or reference number
- Amount outstanding on loan

4. Any other liabilities

For more information visit co-oplegalservices.co.uk

