

✓ Fill out this template for your own use

Savings and Investments	
Saving Plan 1 (E.g. ISA)	
Type of plan	
Company	
Annual/monthly payment to the plan	
Current amount in the plan	£
Joint or single names?	
Is it written in trust?	
Beneficiaries?	

Saving Plan 2	
Type of plan	
Company	
Annual/monthly payment to the plan	£
Current amount in the plan	£
Joint or single names?	
Is it written in trust?	
Beneficiaries ?	

Investment Bonds	
Company(ies)	
Total current value	£
Joint or single names?	
Are they written in Trust?	
Who are the Beneficiaries?	

Stocks and Shares	
What is their total current value?	£
Joint or single names?	
Are they written in Trust?	
Who are the Beneficiaries?	
Do you have any premium Bonds? Current value?	£

Other Benefits, Income or Payments	
How much in total each week/month?	£
Are your benefits a personal entitlement?	
Are your benefits a family entitlement?	
Do you receive regular income support from a previous partner?	
Are these payments paid into a joint account?	
Do you make any payments to support a previous partner or children?	
How much each month?	£
Are these payments made from a joint or single account?	

