

PERSONAL INFORMATION LOG

NAME :	
COPY WITH :	
LAST UPDATED ON :	

Zetland's Personal Information Log ("PIL") is intended to facilitate the location of important documents and information in the event of death or incapacity. Its main purpose is to help with the practical difficulties of organising matters at a time when close relatives may be distressed.

Zetland's PIL may be used simply as an aide memoire; printed as a hard copy document (and manually completed) or used as an updatable electronic document in pdf format. In the latter case the PIL should be password protected and stored securely.

Zetland's PIL is not a Will and should not be regarded as such. It should not contain instructions about what should be done with 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 strongly advised to do so and Zetland can assist in drafting Wills.

It is suggested that a responsible adult is made aware of the existence/location of this PIL (and access password if used) and/or a copy should be given to a close relative/executor or trusted professional adviser as a precaution against a common calamity. It is important that the PIL be kept up to date for material changes.

PERSONAL INFORMATION LOG

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1. Personal Information

Include the location of passwords and documents if they are not kept in this binder.

(a) Self Information

Full Name	
Date of Birth	
Citizenship	
Country of Residence	
Passport Number / Expiry Date	
Primary Residential Address	
Driving License/ Expiry Date	
Club Memberships/ Membership Nos.	
Professional Affiliations/ Affiliation Nos.	
Home Telephone	
Personal Mobile No.	
Work / Other Mobile Phone	
Personal Email addresses	
Linked-In Account	
Twitter Account	
Skype Account	
Face Book Account	
Other Digital Accounts	
Safe Deposit Box	
Key No.	
Where Found	

2. Family Information

(a) Spouse/Partner Information.

Full Name	
Date of Birth	
Citizenship	
Country of Residence	
Passport Number	
Passport Expiry Date	
Primary Residential Address	
Home Telephone No.	
Personal Mobile No.	
Work / Mobile Phone No.	
Personal Email Addresses	
Linked-In Account	
Twitter Account	
Skype Account	
FaceBook Account	
Other Digital Accounts	

(b) Children

Name	Date of Birth	Resident (City/Country)	Contact No.

(c) Grandchildren

Name	Date of Birth	Resident (City/Country)	Contact No.

3. Emergency Contacts & My Will

(a) Emergency Contacts

These could include your lawyer, religious leader, close family friend, etc.

Name	Address	Contact No.

(b) My Will

Your original will should be kept in a safe or safety deposit box, and a copy filed after this page.

Date of last will	
Dates of Codicils (if any)	
The original of my will is kept in / at	
My will was prepared by (Name & Company)	
Address	
Telephone No.	
Email	
My executor is (Name & Company)	
Address	
Telephone No.	
Email	

4. Health & Funeral Information

Health Insurance Company	
Address	
Telephone No.	
Email	
Policy No.	
I take these medicines (Type and dosage)	
I am allergic to these medicines (if none, state 'None')	
I am allergic to these foods (if none, state 'None')	
I have been diagnosed with these medical conditions (if none, state 'None')	
I carry a donor card and it is kept in (if none, state 'None')	
My Doctor is	
Practice name & address	
Telephone No.	
Email	
I have made funeral arrangements with	
Undertaker's name & address	
Telephone No.	
Email	

5. Powers of Attorney

List the people to whom you have given a power of attorney, for example with respect to financial, business, health or any other matters including any Enduring Power of Attorney. Copies of the powers of attorney should be filed after this page. The original should be kept in a safe or safety deposit box by each attorney.

Name	Address	Contact No.

6. Professional Advisors

These include your lawyer, accountant, financial advisors and any other professionals you have instructed on arranging your personal and business affairs.

Name	Address	Contact No.

7. Insurance Policies

Original policy documents should be kept in a safe or safety deposit box. Copies should be filed after this page. Policies could include life assurance, pensions, mortgage, personal accident or disability, key man, building, contents, car, etc.

Insurer & address	Type of policy	Original kept at	Policy No.	Renewal Date

8. My Home

Originals of title deeds, and lease agreements and mortgage or other security documents should be kept in a safe or safety deposit box. Copies should be filed after this page.

Primary Residence <i>(As set out on Part 1 – Personal Information)</i>	
Mortgaged with	
Address	
Telephone No.	
Email	
Second residence	
Mortgaged with	
Address	
Telephone No.	
Email	
Third residence	
Mortgaged with	
Address	
Telephone No.	
Email	
Fourth residence	
Mortgaged with	
Address	
Telephone No.	
Email	

9. My Investments

List your investment accounts held with investment banks / brokers, etc. Latest monthly, quarterly or annual statements should be filed after this page.

Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	

10. My Bank Accounts

List your bank accounts. Latest monthly, quarterly or annual statements should be filed after this page.

Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	

11. My Pensions

List your pension details. Latest monthly, quarterly or annual statements should be filed after this page.

Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	

12. Debts Due to Me

List any loans you have made, whether of cash or goods, such as jewelry or artwork. Original loan agreements should be kept in a safe or safety deposit box. Copies should be filed after this page.

Borrower	
Amount / Item	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	

13. Debts Owed by Me

List any borrowings you have made, whether of cash or goods, such as jewelry or artwork. Original loan agreements should be kept in a safe or safety deposit box. Copies should be filed after this page.

Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	
Institution	
Contact	
Address	
Telephone No.	
Email	

14. Credit Cards

List your credit cards. Latest monthly, quarterly or annual statements should be filed after this page.

Type	
Card Number	
Issuer bank / institution & address	
Telephone No.	
Email	
Type	
Card Number	
Issuer bank / institution & address	
Telephone No.	
Email	
Type	
Card Number	
Issuer bank / institution & address	
Telephone No.	
Email	
Type	
Card Number	
Issuer bank / institution & address	
Telephone No.	
Email	
Type	
Card Number	
Issuer bank / institution & address	
Telephone No.	
Email	

15. Motor Vehicles

Registration No.	
Make Model	
License No.	
Registration No.	
Make Model	
License No.	
Registration No.	
Make Model	
License No.	
Registration No.	
Make Model	
License No.	
Registration No.	
Make Model	
License No.	
Registration No.	
Make Model	
License No.	

16. My Business / Employment

(a) If Employed

Employer	
Contact	
Address	
Telephone No.	
Email	

(b) If Self-Employed / Own Business

Business Name	
Directors	
Address	
Telephone No.	
Email	
Percentage of shares owned	
Company law firm name	
Law Firm Address	
Contact	
Telephone No.	
Email	
Company auditor name	
Auditor Address	
Contact	
Telephone No.	
Email	
Other Directors	

17. Tax Returns

Original tax receipts should be kept in a safe or safety deposit box. Copies of the last three years tax returns together with copies of the tax receipts for tax paid should be filed after this page.

Tax Office	
Address	
Contact (if known)	
Telephone No.	
Email	
Last return made on	

18. Birth, Marriage, Divorce and Death Certificates

Original certificates should be kept in a safe or safety deposit box. Copies should be filed in date order following this page.

Date	Type	Named in certificate

19. Trust Deeds, Foundation Charters, Interests in Private Companies or Partnerships

Original deeds, share or partnership participation certificates should be kept in a safe or safety deposit box. Copies should be filed following this page, together with any memoranda of wishes or similar documents.

Date	Type	Original kept at / with

20. Other items