



MaxLyte
Financial

MY LIFE BOOK

MY LIFE AND POSSESSIONS

WHAT I OWN, WHERE THEY ARE KEPT
AND MY LAST WISHES

My Life And Possessions

What I Own, Where They Are Kept And My Last Wishes

Whenever a close family member, or friend, dies, it is invariably a traumatic time for those who are now in mourning for their loved one. Where the friend or family member also has to act as Executor to deal with the estate of the deceased, they are placed in the position of having to piece together the life of the deceased by finding key documents, accounts and all sorts of other details which will be needed to be able to wind up the person's estate.

Following the death, the most important documents, such as the Will, bank account details, stock and share certificates, life assurance policies (to name a few), ought to be easily accessible.

Acting as an Executor is a hard enough task for a friend or family member without being placed in the difficult position of having to guess where all these important documents are kept. Placing yourself in the shoes of your named Executors - do they know about all of your bank accounts, are they aware that you have fully paid-up life assurance policies?

Between them, insurance companies and banks hold billions of pounds worth of unclaimed insurance policies and funds in bank accounts of the deceased. If the Executors, family, or friends are unaware of their existence, then the money rightfully belonging to the estate of the deceased will remain hidden away in the recesses of bank vaults and insurer's computer systems. These organisations do attempt to trace the rightful account holders, but are not always successful, especially if there are no immediate next-of-kin surviving.

However, you can take control of what happens after your death, and so make matters much easier for your Executors in their task of sorting out your affairs, by documenting all of your assets, policies, possessions and debts.

Lyte Life Book

The Lyte Life Book is designed to help you put your affairs into good order for your Executors prior to your last day, along with outlining your wishes for your funeral.

We also encourage you to provide a copy of your Lyte Life Book to key members of your family, as well as your solicitor, accountant and financial adviser. This will ensure that all of the key people who will be involved in winding up your affairs know where they need to be involved. This will help reduce the amount of work, and thus cost, to your estate.

We hope that your Lyte Life Book is helpful to you and will give you peace of mind that your wishes will be carried through as you desire them to be.

About Me

NAME:	
DATE OF BIRTH:	
NATIONAL INSURANCE NUMBER:	
TAX REFERENCE:	

Key Contacts

MAXLYTE FINANCIAL	Telephone	Contact
MaxLyte Financial 16 Stone House 9 Weymouth Street London W1W 6DB	020 79932882 07710 065700 peter@maxlyte.co.uk	Peter Maxwell-Lyte
SOLICITOR	TELEPHONE	CONTACT
ACCOUNTANT	TELEPHONE	CONTACT
DOCTOR	TELEPHONE	CONTACT
TAX OFFICE	TELEPHONE	CONTACT

EMPLOYER	TELEPHONE	CONTACT
OTHERS	TELEPHONE	CONTACT

My Will

THE ORIGINAL OF THE WILL IS HELD WITH:	
THE WILL IS DATED:	
THE WILL WAS DRAWN UP BY:	
MY EXECUTORS ARE:	

Other Information

PLEASE USE THIS SECTION TO RECORD ANY ADDITIONAL INFORMATION SUCH AS, ORGAN DONATION, DEED/SAFE ACCESS AND LOCATION, COMPUTER LOGINS, ETC.

Powers Of Attorney

DATE MADE	NAME AND ADDRESS OF ATTORNEYS	HAS IT BEEN REGISTERED? YES / NO	NAME AND ADDRESSES OF INDIVIDUALS TO BE NOTIFIED OF ANY APPLICATION TO REGISTER THE EPA/ LPA

Bank / Building Society Accounts

BANK / BUILDING SOCIETY (NAME AND ADDRESS OF BRANCH)	SORT CODE	ACCOUNT NUMBER	CONTACT

Credit Cards

CREDIT CARD COMPANY	ACCOUNT NUMBER	CONTACT

Loans

COMPANY	ACCOUNT NUMBER	CONTACT

My Assets

INVESTMENT BONDS / UNIT TRUSTS	INVESTMENT DETAIL	PLAN NUMBER / ACCOUNT NUMBER	CONTACT

PEP / ISAS	INVESTMENT DETAIL	PLAN NUMBER / ACCOUNT NUMBER	CONTACT

My Assets (continued)

SAVINGS & LIFE ASSURANCE PLANS	INVESTMENT DETAIL	PLAN NUMBER / ACCOUNT NUMBER	CONTACT

STOCKS & SHARES	INVESTMENT DETAIL	PLAN NUMBER / ACCOUNT NUMBER	CONTACT

My Assets (continued)

OTHER ASSETS (PREMIUM BONDS, NATIONAL SAVINGS, ETC.)	INVESTMENT DETAIL	PLAN NUMBER / ACCOUNT NUMBER	CONTACT

Other Information

COMMENTS / NOTES ABOUT YOUR ASSETS

Empty box for comments or notes about assets.

My Pension

PROVIDER NAME AND ADDRESS	LATEST PLAN VALUE	PLAN NUMBER / ACCOUNT NUMBER	CONTACT

COMMENTS / NOTES ABOUT YOUR PENSIONS

My Property

TYPE	ADDRESS	APPROX. VALUE	OWNERSHIP	OUTSTANDING LOAN
MAIN RESIDENCE				
OTHER PROPERTY				

COMMENTS / NOTES ABOUT YOUR PROPERTIES

Gifts Made During Lifetime

DATE	AMOUNT AND/OR ASSET	RECIPIENT OF GIFT

Beneficiary Contact Details

NAME	ADDRESS	CONTACT DETAILS

Details Of Organisations Or Clubs

NAME	MEMBERSHIP NUMBER	CONTACT

Other Contacts

(Utility Companies, Insurance, Magazines, TV/Computer Subscriptions)

NAME	MEMBERSHIP NUMBER	CONTACT

ADDITIONAL INFORMATION - WHERE ITEMS ARE STORED, ETC.

Funeral Arrangements

You may have very specific wishes as to how your funeral is carried out, and certainly your wishes will help your recently bereaved family deal with a difficult task at a stressful and sorrowful time for them.

Due to the many different religions throughout the world, this section cannot easily deal with the large array of different rites each religion may have, so the section is specifically laid out to reflect traditional Christian funeral arrangements. However, please alter any titles to suit your own religion, if you so wish.

BURIAL	
PLACE OF BURIAL (LEGAL RESTRICTIONS WILL APPLY)	
CREMATION	
ASHES SCATTERED	
ASHES INTERRED	
PLACE OF INTERRMENT (LEGAL RESTRICTIONS WILL APPLY)	

	YES	NO
CHURCH SERVICE		
NAME AND LOCATION OF CHURCH		

Funeral Service

PROCESSIONAL MUSIC	
HYMN 1	
HYMN 2	
HYMN 3	
READING 1 AND WHO TO READ	
READING 2 AND WHO TO READ	
ADDRESS / HOMILY AND BY WHOM	
RECESSIONAL MUSIC	
ANY OTHER WISHES	



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Investments can fluctuate in value and investors may not get the amount back they invest. Tax treatment is dependent upon individual circumstances and may be subject to change in the future.

Home reversion plans and lifetime mortgages are complex products. To understand the features and risks, ask for a personalised illustration.

The Financial Ombudsman Service is available to sort out individual complaints that clients and financial services businesses aren't able to resolve themselves. To contact the Financial Ombudsman Service please visit www.financial-ombudsman.org.uk.

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