

30
YEARS

fmifa



Letter of Wishes

CONFIDENTIAL

“Life’s better now we have a plan”

fmifa

fm are a firm of independent financial planners, founded in 1991. We provide high quality financial solutions to both individuals and businesses; our ethos is centred upon providing the highest possible level of service to our clients. We are experienced in helping you think through your issues, opportunities and future goals to create a personalised financial plan and investment portfolio. Our friendly and highly professional team has many years in the financial services sector. Whether it is retirement planning, investment and saving advice, pensions, inheritance tax, estate planning, mortgages, equity release or employee benefits, we have the knowledge and the expertise to help with your particular needs.

No one likes to think about death but planning ahead and being prepared makes a big difference to those you leave behind.

One simple step you can take is to create a record of your personal wishes, so your executors know your preferences, reasoning and guidance to help them make important decisions when you die.

FMIFA have created this booklet for you, so you have an easy place to write your wishes down. We recommend reviewing it once a year.

This information is outside of your Will, so unlike your Will, it isn't legally binding and will not be made public, so the information can be kept confidential and shared with only the people you would like to read it.

If you have any questions, we have our own Will Writer so please do contact us by calling 01494 817151 or emailing advice@fmifa.com.

MY PERSONAL DETAILS

Full Name _____

Who is your Financial Adviser? _____

IMPORTANT DOCUMENTS

I have made a Will, and it is kept _____

My most recent Will is dated _____

My executors are _____

I have a Lasting Power of Attorney (LPA) Yes No

My LPAs are stored _____

I keep my:

Birth Certificate _____

Marriage Certificate _____

Passport _____

Driving license _____

Desk, Cabinet Keys _____

Other _____

fmtip } We would recommend everyone has an up-to-date Will and a Lasting Power of Attorney for financial decisions plus one for medical decisions. Please contact us, if you wish to chat to FM's Will Writer.

ARRANGEMENTS FOR CHILDREN

ARRANGEMENTS FOR PETS

If you have pets, make a note of what arrangements you'd like to be made for them.

MY CONTACTS

Think about leaving a list of friends and family you would like to be informed of your death. A simple list kept up to date with name and contact details can really help. Social media access details can be noted here too.

If you have completed this document, it is really important that you keep it in a secure place at all times as it will contain sensitive and confidential information.

We recommend you store this alongside your Will but do not attach it as this may invalidate the Will.

If you have any further questions or wish to update your Will, please contact us, we are happy to help you.

“Talking about death and dying won’t make it happen. But not talking about it or not planning for it, can leave people worse off than they need to be.”

Gary Rycroft
Chair of the Dying Matters Forum

Speak to an expert

We spend our days helping clients with estate planning and Inheritance Tax. The easiest way to find out how we can help is to book an initial consultation.

fmifa

Financial Management
Independent Financial Advice

Wealth Management | Investments | Will Writing
Retirement Planning & Pensions | IHT Planning
Lifetime Mortgages for Equity Release

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