



**Safe in  
our Hands**

**Now, for tomorrow**



# Introduction

Hello and welcome to what we hope you will find is a really useful document.

Many of us spend most of our lives planning ahead. We wouldn't go on holiday without choosing the hotel first, booking the dog into kennels, or cancelling the papers. So why should the end of our life be any different?

Nobody likes to think about the end of their life, but putting our affairs in order, tying up all the loose ends, helps us to stay in control and ensure that our wishes are carried out.

Whether you are a family member, an executor or a solicitor, if you can access information quickly life will be so much easier.

Why not take the time to complete this form, we will be delighted to help you and MHA Tait Walker Wealth Management can assist you with keeping your affairs up to date at your annual review.



# Key contacts

**Name:**

**National Insurance Number:**

**Tax Reference:**

**Date of Birth:**

**Name and Address**

**Contact**

**MHA Tait Walker Wealth Management:**

**Solicitor:**

**Accountant:**

**Doctor:**

**Tax Office:**

**Employer:**

**Bank Manager:**

**Others:**