

Power of Attorney Checklist

Bank and Building Society		
<i>Name of bank</i>	<i>Account number</i>	<i>Sort code</i>
Credit Cards		
<i>Company</i>	<i>Account number</i>	<i>Other</i>
Private Pensions		
<i>Company</i>	<i>Account number</i>	<i>Other</i>
Shares & Investments		
<i>Company</i>	<i>Account number</i>	<i>Other</i>
Life policies		
<i>Company</i>	<i>Account number</i>	<i>Other</i>
NS&I Premium Bonds & Investments		
<i>Name of Investment</i>	<i>Account number</i>	<i>Other</i>
State Benefits		
<i>Retirement Pension</i>	<i>Reference number</i>	<i>Other</i>
<i>DLA</i>	<i>Reference number</i>	<i>Other</i>
<i>Other Benefits</i>	<i>Reference number</i>	<i>Other</i>

HMRC Income Tax		
<i>Name of Tax Office</i>	<i>Tax Reference</i>	<i>Other</i>
Insurance		
<i>Company</i>	<i>Policy number</i>	<i>Other</i>
Home		
Life		
Pet		
Car		
<i>Company</i>	<i>Due date</i>	<i>Other</i>
Insurance		
MOT		
Tax		
Service		
Properties		
<i>Address</i>	<i>Mortgage (Y/N)</i>	<i>Full ownership (Y/N)</i>
Other assets		
Other income		
Utilities		
<i>Company</i>	<i>Account number</i>	<i>Due date</i>
Gas		
Electricity		
Water		
Telephone		
Mobile phone		
Electricity		
Internet		
Sky / Netflix / other		
Council Tax		
TV Licence		

Debts and loans		
<i>Company</i>	<i>Account number</i>	<i>Due date</i>
Mortgages		
Loans		
Debts		
Car finance		
Betting sites		
Online retail		
<i>Company</i>	<i>Account number</i>	<i>Due date</i>
iTunes		
Spotify		
Amazon subscriptions		
Other subscriptions		
Advisors		
<i>Company</i>	<i>Account number</i>	<i>Due date</i>
Accountant		
Financial advisor		
Solicitor		