



Your peace-of-mind scorecard

How far have you gone to minimise the stress for your loved ones?

A lot of people put inheritance planning off. It's often as a result of their busy lives as well as not knowing where to start. By not planning ahead, it can mean unwanted problems at an emotional time for the people that care about you most. How could you be more prepared? Take the time to see how prepared you are and find out your peace-of-mind score.

		N/A	Sorted	Not sorted
1	My loved ones - If I am a parent/carer of small children or look after someone full-time, measures are in place to take care of those people who are dependent on me, if something happens to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	My friends, family and network - _____ knows how to contact all of my friends and family, if something happens to me. For example, people I know through clubs and societies, or any social media sites.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	My pets and animals - If I have pets/other animals, I've sorted out who will look after them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	My digital devices - I have safely recorded the passwords to allow someone else to open my PC, laptop, tablet or smartphone.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	My secure life - Someone knows where important keys/passwords are stored. For example, keys to cabinets, burglar alarms, password to photo sharing website, code for personal safe.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	My memories - _____ knows where I have kept things which mean something to me. For example, family photographs, heirlooms, keepsakes, memoirs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	My health and medical information - _____ knows the key contact details, eg. for my doctor, optician and dentist. Someone knows and can easily access details about any allergies I have.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	My home - _____ knows the key information relating to my house. For example, key contacts for maintenance, where the title deeds are stored and information about utilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	My holiday home - Arrangements are in place for my holiday home/timeshare/holiday bond dealing with who inherits it e.g. I have a will to cover my holiday home abroad.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	My appointed representative - I have done a power of attorney and someone knows where it is safely stored. I have considered whether I need a welfare power of attorney.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

		N/A	Sorted	Not sorted
11	My savings plans – I know the policy or account numbers for my ISAs, pension(s) and insurance policies, what they are worth and who they are with.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	My Pension Beneficiaries – I have completed a Beneficiary Nomination for my pensions and reviewed this within the last 5 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	My net worth – I know the value of what I own, what debts I have and whether inheritance tax affects my estate. I have gathered together all key papers in a safe place and someone knows where they are.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	My lifetime gifts – I have thought about whether I want to pass on any assets or money now, and understand the potential tax benefits of this. I have kept a note of any lifetime gifts I have made.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	My will – I have an up-to-date will which reflects my current wishes. For example, I have considered whether I want to leave anything to friends or charities as well as family.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	My final wishes – If I have any preferences about 'end of life' medical decisions, someone knows where I have written down my wishes. For example, if I have signed an Organ Donor card, someone knows about it. Someone knows my preferences for the kind of funeral I'd like.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What's your peace-of-mind score?		<input type="text"/>	/	<input type="text"/>

Now you have your peace-of-mind score, you should know where you need to seek help or take action. And it doesn't just end there. Refer back to your score and consider what you need to do for peace of mind.



Find out more

To find out more about abrdn's will and inheritance planning services email us here:

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For more information visit abrdn.com

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