

Life Event Inserts



Not for me: this section does not apply

Tick here and in the Contents, then skip ahead (no need to print it either).

Some changes can't wait for the annual review. When something major happens, fill in the matching insert below and attach it to the right section, so your organiser updates instantly without rewriting whole chapters.

Your Life Event Inserts

Fill one in each time a major life event happens, so updates never pile up.

INSERT 1: NEW CHILD OR GRANDCHILD

DATE OF BIRTH

CHILD'S NAME

RELATIONSHIP / PARENTS

UPDATES NEEDED & ACTION TAKEN

INSERT 2: MARRIAGE OR NEW RELATIONSHIP

Major life events like marriage can affect your Will, so it is worth reviewing it with your solicitor when your circumstances change.

DATE

SPOUSE / PARTNER NAME

CERTIFICATE / PRENUP LOCATION

UPDATES NEEDED & ACTION TAKEN

INSERT 3: DIVORCE OR SEPARATION

DATE

FORMER SPOUSE / PARTNER

SETTLEMENT / ORDERS LOCATION

UPDATES NEEDED & ACTION TAKEN

Your Life Event Inserts (cont.)

INSERT 4: PROPERTY PURCHASE OR SALE

DATE

PROPERTY ADDRESS

BOUGHT OR SOLD

UPDATES NEEDED & ACTION TAKEN

INSERT 5: BANK ACCOUNT OR INVESTMENT CHANGE

DATE

ACCOUNT / INVESTMENT

OPENED OR CLOSED

UPDATES NEEDED & ACTION TAKEN

INSERT 6: JOB CHANGE OR RETIREMENT

DATE

DETAILS

SUPER / INSURANCE CHANGES

UPDATES NEEDED & ACTION TAKEN

INSERT 7: MAJOR MEDICAL EVENT

DATE

DETAILS

Your Life Event Inserts (cont.)

UPDATES NEEDED & ACTION TAKEN

INSERT 8: BUSINESS STARTED OR CLOSED

DATE

BUSINESS

STARTED OR CLOSED

UPDATES NEEDED & ACTION TAKEN

INSERT 9: DEATH OF A BENEFICIARY

DATE

WHO

UPDATES NEEDED & ACTION TAKEN

INSERT 10: MOVED HOUSE

DATE

NEW ADDRESS

UPDATES NEEDED & ACTION TAKEN

Your Life Event Inserts (cont.)

ADDITIONAL LIFE EVENT NOTES

Extra Space

More room for your Life Event Inserts section: extra entries, stories, or anything the boxes could not hold.