

# VITAL FINANCIAL INFORMATION

## Keep this Safe



### Why it Matters?

We hope you never need to claim on your insurance but life doesn't always go smoothly. If you need to claim on one of your policies, then the information you need is below. Please feel free to contact me if you need help or want to discuss any of your policies.

### Your Current Financial Package



#### Mortgage

Lender:  
Account No:  
Mortgage Balance:  
Interest Rate:  
Product Expires:  
Monthly Payment:  
Overall Term:  
**Contact No:**



#### Income Protection

Insurer:  
Policy No:  
Monthly Benefit:  
Deferred Period:  
Monthly Cost:  
Policy Started:  
Policy Finishes:  
**Contact No:**



#### Life Cover

Insurer:  
Policy No:  
Monthly Benefit:  
Deferred Period:  
Monthly Cost:  
Policy Started:  
Policy Finishes:  
**Contact No:**



#### Critical Illness Cover

Insurer:  
Policy No:  
Monthly Benefit:  
Deferred Period:  
Monthly Cost:  
Policy Started:  
Policy Finishes:  
**Contact No:**



#### Will & Lasting Powers of Attorney

Will Provider:  
Date Will signed:  
Date Last Reviewed:  
Lasting POA:

**Contact No:**



#### Notes

As part of our service to you, we will make contact once a year to see if your circumstances have changed and whether the policies in place are still suitable for you. Feel free to contact us sooner if you want to address any protection shortfalls or additional borrowing needs.



07458 301 818  
07455 235 211



[veterinaryfinances.co.uk](http://veterinaryfinances.co.uk)



[info@veterinaryfinances.co.uk](mailto:info@veterinaryfinances.co.uk)