



## **The Life Inventory**

A comprehensive review of  
your financial life and estate  
by Chrissie Elgar ACA

## **What is a life inventory?**

Put simply, it's a complete review and summary of important personal and financial information. A life inventory can often include but is not limited to: review and organization of personal and financial documents; recording of relevant information and consolidation into a comprehensive report; identification of missing and incomplete data; quarterly and annual task lists.

## **What is the benefit of a life inventory?**

There are many benefits to making such an inventory. First and foremost is peace of mind. The process provides you with a complete overview of your financial and personal life. You will also have a well-organized, easy to access system for all of your important documentation.

Secondly, you will save time and be able to make more effective decisions as the relevant information will be consolidated in a single document. This makes it easy to share information with family members and with your legal and financial advisers.

It is also an invaluable source of information if you move house, as it contains details of those contacts needing to be informed of a change of address.

Lastly, you are being responsible. Many people avoid preparing for their eventual death and this brings additional grief and burden to family members. A life inventory provides your family with access to your most current financial and personal documents, essential for a probate application or for dealing with questions about your will and your assets.



## How we work together

This type of work means delving into many different parts of your life and ensuring that loose ends are tied up. I am aware that this can sometimes be an unsettling and difficult process and will be as considerate as I can in dealing with confidential and sensitive information. We will have an initial discussion so that you can provide me with some background detail and, on the basis of this discussion, we will agree what will be involved in the inventory and how long it is likely to take. I will come to you - either your home or office, depending on where the paperwork/details are kept - and will collate the information, which will be provided to you subsequently in a comprehensive report.



*Chrissie's service is practical therapy. She gives you peace of mind as well as an organized office. I cannot recommend her service highly enough*



Property Management Consultant, London

## How much does a Life Inventory cost?

The cost of a standard life inventory is £395.00.

If you need extra help pulling together the information or would like further analysis, this can be provided at an additional cost.



### Chrissie Elgar

I'm a qualified chartered accountant, with over 25 years of experience in corporate accounting, financial project management and asset management. In one of my roles, as Treasurer of an in-house pension scheme, I worked closely with senior executives on the administration of their retirement assets. This specific experience gave me insight into the benefits of taking a practical, organized approach to one's financial life.

### My approach

When working with clients I bring a personable and practical approach to each discussion. I work discreetly and I understand the confidential nature and sensitivity that surrounds this type of work. I have a strong attention to detail and will maintain clear and direct communication with you throughout the process.





*I have found Chrissie to not only be an incredibly efficient and professional accountant, but also a warm and approachable person who I would have no hesitation in recommending to others.*



Photographer, London

**A Life Inventory gives you peace of mind in knowing that you have all the details of your financial and personal estate at your fingertips – saving you or your next of kin time searching for information when it is needed**

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