

You're viewing Craig Palfrey's report

Approved



# Your Legacy Preparedness Report

Clarity today, security tomorrow

81 /100

Age group average



This report gives you a complete view of your legacy preparedness across legal documents, family decisions, and key financial protections. It highlights what's in place, what needs attention, and the next steps to help reduce future stress and honour your wishes.

Together, these insights form a personalised action plan to help you close important gaps and prepare your family with clarity and confidence. Where legal services are needed - including **creating a new will** or setting up **Lasting Powers of Attorney** - you can purchase them directly through Inherity.

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## Legacy preparedness summary

An overview of your current preparedness and the areas to strengthen.

We've assessed the key elements that shape how smoothly your legacy can be carried out. Your score reflects how well your affairs are set up to reduce stress, increase impact, and ensure a smoother handover, when it matters most.

**You're in a strong position.** A few small updates could tighten your plan, reduce risks, and ensure everything is clearly set out for your family and future executors.



### Financial resilience

Strong position. Your finances appear well-prepared to handle unexpected events.

92 /100

- ⓘ Key financial assets not documented or shared
- ✔ Life Insurance in place
- ✔ Income protection in place
- ✔ Partner survivor income in place
- ✔ Beneficiary nominations up to date
- ✔ Financial support in place for dependent

### Legal preparedness

Good foundations. A review can help ensure everything stays current and clear.

73 /100

- ✘ No Property & Finance Lasting Power of Attorney in place
- ✘ No Health & Welfare Lasting Power of Attorney in place
- ✔ Will in place

### Tax optimisation

Strong position. Your estate appears well-considered from a tax perspective. Regular reviews help keep it that way.

100 /100

- ✔ Professional tax and inheritance advice in place
- ✔ Trust(s) are in place to manage and protect your estate
- ✔ Life insurance is in trust, reducing inheritance tax

### Practical readiness

Some preparations made. More clarity could reduce confusion in difficult moments.

54 /100

- ⓘ Executors and family may not know where important paperwork is stored
- ⓘ Key financial assets not shared
- ⓘ Executors and family may not be able to access your digital information
- ⓘ Funeral wishes not documented
- ✔ Executors informed of role
- ✔ Will accessible to executors

### Wishes and alignment

Strong clarity. Your intentions appear well-documented and easy to understand.

82 /100

- ⓘ Funeral wishes not documented
- ✔ Will in place
- ✔ Partner's right to remain in home in place



Expert estate planning made simple, secure, and stress-free.

#### Legal

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# What to focus on first



**Your next steps, prioritised. For quick action and lasting impact.**

Based on your responses, we've identified your top priorities - simple, high-impact actions to move forward with clarity and confidence. Here are your key actions to complete in the next two weeks to improve your legacy preparedness and give your loved ones peace of mind.

**Each one is tailored to your situation and designed to make a meaningful difference - fast.**

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## 01 Create a Property & Finance Lasting Power of Attorney

Legal Preparedness

No one is legally appointed to make decisions about your finances if something happens.

[Start Property & Finance LPA](#)

## 02 Create a Health & Welfare Lasting Power of Attorney

Legal Preparedness

No one is legally appointed to make decisions about your health or care if something happens.

[Start Health & Welfare LPA](#)

## 03 Inform executors and family of information location

Practical Readiness

You've stored important paperwork, but your family may not know where to find it.

## 04 Store and share key digital info

Practical Readiness

Your digital accounts may be important, but your family may not be able to access them.

## 05 Write a letter of wishes

Practical Readiness

You haven't yet recorded your funeral preferences.

**We recommend prioritising these actions first - Inherity can guide you each step and connect you with trusted professionals**

# Personalised action plan



We've grouped your next steps by who can help - from estate planners and financial advisers to tasks you can complete yourself.

Each includes a brief insight, why it matters, and what to do next to make things clearer, simpler, and more secure for your loved ones..



### Inherity can help you close these gaps

Complete these essential documents directly through our platform - simple, guided, and stress-free.

[Find out more](#)

INSIGHT	WHY IT MATTERS	ACTION REQUIRED	PRIORITY
No one is legally appointed to make decisions about your finances if something happens.	No one is legally able to manage your finances if you lose capacity. This could cause delays or financial stress.	Create a Property & Finance Lasting Power of Attorney	Now
No one is legally appointed to make decisions about your health or care if something happens.	Medical or care decisions could be delayed or made by people you haven't chosen.	Create a Health & Welfare Lasting Power of Attorney	Now



### Tasks to do yourself

These are simple steps you can complete yourself to improve clarity and reduce future stress

INSIGHT	WHY IT MATTERS	ACTION REQUIRED	PRIORITY
You've stored important paperwork, but your family may not know where to find it.	This could delay the estate process and add unnecessary stress for your family.	Inform executors and family of information location	Next
Your key financial information isn't shared.	Without this, your family or executors may not know where your key assets are held - delaying access or losing value.	Share a list of your key financial assets	Next
Your digital accounts may be important, but your family may not be able to access them.	This could lead to lost information, assets, or memories.	Store and share key digital info	Later
You haven't yet recorded your funeral preferences.	Your family may be left unsure of what you would've wanted. Even if you don't have strong wishes, noting this helps your family feel confident about what to do.	Write a letter of wishes	Later