



Power of Attorney Search

Why use Inheritance Data?



We are the UK's leading financial asset search specialists with a decade of knowledge & expertise in asset repatriation

- We contact over 350 financial databases
- Our Power of Attorney search uncovers accounts and policies which may have been unknowingly lost by requesting a full profile search under the Mental Capacity Act 2005

Why do a Power of Attorney Search?

- There is £1.3 billion sitting in UK bank accounts, increasing by £100 million every year, £3 billion in National Savings and Investments and an estimated £200 billion in closed book pension accounts. **These figures are continuing to grow every year**
- Our POAS allows an Attorney to submit a search for assets on behalf of a Donor where an LPA, Deputyship Order or Court of Protection order is in place
- Conducting a POAS ensures you have an up to date and complete picture of the financial assets of the Donor, so that these can be accurately detailed in their will or as part of their estate planning process
- Understanding where all the Donor's assets are and ensuring none have been missed ensures they can plan for their future accurately and easily
- Regular asset searching is part of good practice in financial and estate planning



Industry experts in customer service & education, ensuring best practice delivery





How does it work and what do I need to provide?

- Register for our free portal at www.inheritedata.co.uk which provides 24/7 access to third parties conducting the search as well as individuals
- Log into your account and select Power of Attorney Search
- Fill in our simple online submission form with details of the person whose assets need to be searched, including, DOB, NI number and addresses
- Upload a registered Lasting Power of Attorney, (LPA), Deputyship Order or Court of Protection Order and a Letter of Authority signed by the Attorney (Available to download in our portal)
- Submit the search
- You can log into your secure account on the online portal to check matches and no matches 24/7. Each report shows all the institutions that have responded, along with details to help with the claiming process. The online report is available from day one of the search and will uncover a map of the estate's financial history



£150 + VAT fixed rate per search

What will the search cover?

- Banks and building societies
- Personal pensions
- Department of Working Pensions (DWP)
- Investments
- Life assurance
- National Savings & Investments (NS&I)
- Shares - *The Dormant Asset Commission Report estimates there is £640 million unclaimed in share registers*

