

ME

Surname		Given Names	
Former Name(s)			
Date of Birth		Place of Birth	
Residential Address			
Home Phone/Mobile		Work phone	
Email (preferred)		Other email	

MY FAMILY

SPOUSE Name		Date of Birth	Place of Birth	
FIRST BORN CHILD name	Date of Birth	Place of Birth	Other Parent	
Address				
Email		Phone		
SECOND BORN CHILD name	Date of Birth	Place of Birth	Other Parent	
Address				
Email		Phone		
THIRD BORN CHILD name	Date of Birth	Place of Birth	Other Parent	
Address				
Email		Phone		
FOURTH BORN CHILD name	Date of Birth	Place of Birth	Other Parent	
Address				
Email		Phone		
FATHER Name	Date of Birth	Place of Birth		
MOTHER Name	Date of Birth	Place of Birth	Maiden Name	
FORMER SPOUSE(S) Name	Separated Date	Divorced Date	Date of Birth	

EMERGENCY CONTACT

PRIMARY	Name / Relationship	Phone
RESERVE	Name / Relationship	Phone

MEDICAL ISSUES

ORGAN DONATION

MEDICAL ATTORNEY	Name / Relationship	Phone
MEDICAL ATTORNEY - alternate	Name / Relationship	Phone

ADVANCED HEALTH DIRECTIVE

Medicare number

Private health insurance	Name / Relationship	Member No	Phone
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FINANCIAL ATTORNEY

PRIMARY	Name / Relationship	Phone
ALTERNATE	Name / Relationship	Phone

ENDURING GUARDIAN

PRIMARY	Name / Relationship	Phone
ALTERNATE	Name / Relationship	Phone

FUNERAL

Prepaid funeral

Funeral insurance benefit	NAME - APS BENEFITS	Member No	Phone 1300 131 809
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LAWYER

Name	Firm
Address	Phone

ACCOUNTING & TAX

TFN	ABN
Accountant Name	Firm
Address	Phone

FINANCIAL PLANNER

Name	Firm
Address	Phone

PERSONAL DOCUMENTS

Driver's Licence No.	Expiry	State / Territory
Birth certificate - reg. No.	Location	
Passport - reg. No.	Location	Expiry
Marriage certificate - reg. No.	Location	

MY WILL

Date	Location
Codicil - date	Location
Executor - Name(s)	Relationship(s)
Address	Phone
Beneficiaries - Name(s)	Relationship(s)
Address	Phone

CENTRELINK

Age pension No.	Senior Card No.	
Disability / other	Type	Number

PERSONAL INSURANCE

Life Insurer	Policy No.	Beneficiary / Owner
Income replacement insurer	Policy No.	

SUPERANNUATION

PUBLIC SECTOR fund name		Member No.	Pension or Lump sum?	Phone
Public sector - reversionary pensioner	BDBN date	Expiry	Beneficiary	%
			Beneficiary	%
INDUSTRY / RETAIL fund name		Member No.	Pension or Lump sum?	Phone
Industry / Retail - reversionary pensioner	BDBN date	Expiry	Beneficiary	%
			Beneficiary	%
SMSF Fund name		Other member(s)		
SMSF trustee	BDBN date	Expiry	Beneficiary	%
			Beneficiary	%
SMSF - reversionary pensioner	BDBN date	Expiry	Beneficiary	%
			Beneficiary	%

REAL ESTATE

HOME address	Title particulars: Vol	Folio
Title held by		
Home insurance		
HOLIDAY HOME address	Title particulars: Vol	Folio
Title held by		
OTHER INVESTMENT PROPERTY address	Title particulars: Vol	Folio
Title held by	Letting agent details	

BANK ACCOUNTS

Bank Name	Branch	Account No.	Joint?
Bank Name	Branch	Account No.	Joint?
Bank Name	Branch	Account No.	Joint?
Online Bank Name	User name	Password	
Online Bank Name	User name	Password	

SHARES IN PUBLIC COMPANIES

Company name	No. of shares
Company name	No. of shares
Company name	No. of shares
Broker details	Phone

OTHER INVESTMENTS

Description
Description
Description

MOTOR VEHICLES

Year, make, model		Reg. No.	State/Territory
Insurance	Insurer	Policy No.	3rd party / comprehensive
Year, make, model		Reg. No.	State/Territory
Insurance	Insurer	Policy No.	3rd party / comprehensive

OTHER ASSETS (AUST)

Description	Location	Value
Description	Location	Value
Description	Location	Value
Description	Location	Value
Description	Location	Value

INTERSTATE ASSETS

Description	Location	Value
Description	Location	Value

INTERNATIONAL ASSETS

Description	Location	Value
Description	Location	Value

PRIVATE COMPANIES

Shares	Company name	ACN	Number / %	Type
Shares	Company name	ACN	Number / %	Type
Directorships	Company name	ACN	Director?	Secretary?
Directorships	Company name	ACN	Director?	Secretary?

PRIVATE TRUSTS

Units	Trust name	Trustee	Number / %	Type
Trusteeships	Trust name	Other trustee(s)		
Appointorships	Trust name	Other appointor(s)		

LIABILITIES

Home Loan/ Mortgage	Lender	Amount
Personal Loan	Lender	Amount
Credit Cards	Lender	Amount
	Lender	Amount

DIGITAL ASSETS / ACCOUNTS

Email Account(s)	Account name(s)	Password
Facebook Account	Account name(s)	Password
Twitter Account	Account name(s)	Password
YouTube Account	Account name(s)	Password
Online document storage	Account name(s)	Password
Online photo storage	Account name(s)	Password
Online music storage	Account name(s)	Password
Frequent Flyer	Account name(s)	Password
FlyBuys	Account name(s)	Password
Other	Account name(s)	Password

CLUB & ASSOCIATION MEMBERSHIPS

Name	Member No.
Name	Member No.
Name	Member No.
Name	Member No.