

SAFE DEPOSIT/PACKETS/DEEDS

Location.....

Keys.....

DETAILS OF ASSETS

House –owned/buying/renting

Location of title.....

Mortgaged to.....

Bank & Investment Accounts

With.....

Account No.....

Life Assurance & Policy No(s)

.....

Superannuation Fund & Policy No(s)

.....

Employee Entitlements

.....

Accountant/Tax Agent

Name.....

Address.....

MEDICAL & HOSPITAL COVER

My doctor.....

Medicare No.....

Medical Fund.....

Membership No.....

FUNERAL ARRANGEMENTS

I Desire: Burial Cremation

Location.....

Religious rites.....

Details of any pre-arrangements

.....

Details of any pre-payments

.....

Do you carry an organ donor card?

Yes No

REVIEW OF INFORMATION

Date this information is to be next reviewed

.....

.....

**Confidential Personal
& Family Record**

of

.....

Address.....

.....

Date of birth.....

MY WILL

Dated.....

Location.....

MY EXECUTORS

Executor 1.....

Address.....

..... Phone.....

Executor 2.....

Address.....

..... Phone.....

A service of Whitsunday Law

CONTACT IN AN EMERGENCY

Name.....

Address.....

..... Phone.....

Power of Attorney is with.....

.....

MARITAL DETAILS

Status:	<input type="checkbox"/>	Single	<input type="checkbox"/>	Separated
	<input type="checkbox"/>	Married	<input type="checkbox"/>	Divorced
	<input type="checkbox"/>	De facto	<input type="checkbox"/>	Widowed

Spouse's name.....

Maiden name (if applicable).....

Date & Place of birth.....

.....

Date & Place of marriage.....

.....

Details of other marriages (if any).....

.....

.....

.....

DETAILS OF CHILDREN

Name & Address.....

.....

Born..... Died.....

Name & Address.....

.....

Born..... Died.....

Name & Address.....

.....

Born..... Died.....

MY PARENTS

Father's name.....

Address.....

..... Phone.....

Born..... Died.....

Mother's name.....

Address.....

..... Phone.....

MY BROTHERS & SISTERS

Born..... Died.....

Name.....

Address.....

..... Phone.....

Born..... Died.....

Name.....

Address.....

..... Phone.....

Born..... Died.....

Name.....

Address.....

..... Phone.....

Born..... Died.....