

Checklist of important documents



Name Date

DOCUMENTS	LOCATION AND DETAILS	
Will, Power of Attorney and Appointment of Enduring Guardian	Location: Dated:	
Birth and Marriage Certificates	Location:	
Credit Card Details	Bank: Account Name: Card No.:	Bank: Account Name: Card No.:
Bank Account Details	BSB: Account No.:	BSB: Account No.:
Driving Licence and Passport	Licence No.: Expiry:	Passport No.: Expiry:
Insurance Policies	Broker's Details:	
Mortgage(s)	Bank: Account No.:	
Superannuation Statements	Adviser Details: Fund(s): Binding Nomination: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Title Deeds	Bank or Location:	
Investment	Broker Name:	
Car	Rego: Insurance:	
Funeral Plan		
Company Directorships		
Safety Deposit	Location: Key:	
Education and Employment	Current Employer: Academic Records:	
Tax records – 7 years	Accountant/Tax Adviser: Name: Address:	

Checklist of important people



Name Date

DOCUMENTS	LOCATION AND DETAILS
Spouse	Name: Contact No.:
Lawyer	Firm Name: Address:
Primary Care Physician	Practice: Address:
Dentist	
Accountant / Financial Adviser	
Health Fund	Name: Account No.:
Travel Insurer	Name: Account No.:
Funeral Director	
Building / Strata Management	Strata Plan: Managing Agent:
Relatives	Name: Address: Phone: Email:
Work (best contact person)	Name: Address: Phone: Email:
Friends	Name: Address: Phone: Email:
Clubs and Associations	Name: Address: Phone: Email:
Any other special people	Name: Address: Phone: Email: