



Personal & Estate Information Pack (New South Wales)



Last updated on: ____ / ____ / ____ Prepared by: _____

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Biographical Information

Full legal name: _____

Known as / nickname: _____

Date of birth: ____ / ____ / _____

Place of birth: _____

Spouse/Partner/Status: _____

Children: _____

Grandchildren: _____

Mothers Name: _____

Fathers Name: _____

Siblings: _____

Current residential address: _____

Postal address (if different): _____

Phone: _____

Email: _____

Education Primary: _____

Education Secondary: _____

Education post secondary: _____

Qualifications: _____

Occupation: _____

Awards and notable accomplishments: _____

Community Involvement: _____

Hobbies: _____

Medicare number: _____ (Ref #__)

Centrelink CRN (if any): _____

Tax File Number (TFN): _____

MyGov status (Y/N): Login location (if noted): _____

Pension/Concession cards: (Type & Number) _____

Driver licence no.: _____ Expiry: ____ / ____ / _____

Passport no.: _____ Country: _____ Expiry: ____ / ____ / _____

Religious/cultural affiliation (if relevant): _____

Where Are My Personal Papers Kept?

Tip: List the *exact* location and any access details (key, code).

Document / Item	Location (Room/Drawer/Folder)	Access Details (Key/Code/Contact)	Notes
Birth certificate			
Marriage/civil partnership certificate			
Passport			
Medicare & concession cards			
Driver licence			
MyGov / ATO letters			
Superannuation statements			
Insurance policies			
Property titles / rates notices			
Vehicle registration papers			
Will (original)			
Power of attorney/ Medical directives			
Funeral/prepaid records			
Digital passwords list (if any)			

Important Contacts

Role / Relationship	Name	Phone	Email
Executor of Will			
Solicitor / Law firm			
Financial adviser			
Accountant			
Primary GP / Clinic			
Specialist(s)			
Enduring Power of Attorney			
Enduring Power of Attorney (financial)			
Medical Treatment Decision Maker			
Next of kin (1)			
Next of kin (2)			
Superannuation fund(s)			
Insurance provider(s)			
Employer / HR			
Funeral director (preferred)			
Centrelink contact (if applicable)			

Notes: _____

Insurance Policies & Superannuation

Include policy numbers, beneficiaries, and where the latest statement is kept.

Insurance Policies:

Type (e.g., Life, Home, Contents, Car, Private Health, Income Protection, Funeral)	Provider	Policy No.	Renewal Date	Beneficiary/Notes	File Location

Superannuation:

Fund: _____

Member/Account No.: _____

Contact/Portal: _____

Insurance Through Super (Yes/No) _____

Binding Beneficiary Nomination (Yes/No) _____ Expiry: _____

File Location: _____

Notes: _____

Family Health History (for your GP and family)

List major conditions (heart disease, diabetes, cancers, dementia, stroke), age at diagnosis if known.

Relative (e.g., Mother, Father, Siblings, Grandparents)	Condition(s)	Notes

Your current conditions & medications:

Conditions:

Medications & doses:

Allergies/adverse reactions: :

Location of Will, Medical Directives & Legal Documents

In Victoria, common documents include: *Will, Appointment of Medical Treatment Decision Maker, Advance Care Directive, Enduring Power of Attorney (financial/personal)*.

Document	Original Location	Copy Location(s)	Prepared By / Date
Will (last signed version)			
Advance Care Directive			
Medical Treatment Decision Maker appointment			
Enduring Power of Attorney (personal)			
Enduring Power of Attorney (financial)			
Guardianship/ Administration orders (if any)			
Marriage/Divorce/De facto paperwork			

Notes: _____

Personal Property (Items & Instructions)

Use this section to help your executor (what's meaningful, who it goes to, and where to find it).

Item	Description/Identifier	Location	To Whom / Instructions	Notes (valuation, receipts, photos)

Assets Overview

List everything you own: bank accounts, investments, super, real estate, vehicles, valuables.

Bank Accounts:

Institution	Account Type	BSB	Account No. (last 3–4 digits only)	Joint?	Approx. Balance	Access Notes

Investments (Shares/Managed Funds/Term Deposits/Other):

Details	Account/Holder No.	Asset Type	Notes (portfolio ID, CHESS HIN, certificates)	Approx. Value

Superannuation:

(See Section 4 for details; summarise values here.)

Fund	Member No.	Approx. Balance	Preservation (Y/N)	Notes

Assets Overview

Real Estate:

Address	Ownership (Sole/ Joint/Trust)	Title/Volume	Mortgage?	Notes (Property manager, rates)	File Location

Vehicles & Registrable Assets:

Type	Make/Model	Year	Rego	Ownership	Notes (loan, insurer)

Other Valuables (jewellery, art, collections):

Item	Location	Notes (valuation, receipts)

Creditor	Type (Mortgage, Credit Card, Personal Loan, ATO, Buy Now Pay Later)	Account/Loan No. (partial)	Interest Rate	Approx. Balance	Repayment Details

[illegible]

Amounts Owed to Me

Debtor (Person/ Organisation)	Reason (Loan, Bond, Invoices)	Amount	Due Date	Evidence Location

Notes: _____

Banking & Digital Access Information

Security tip: Do **not** write full passwords in this document if stored in an unsecured place. Consider a password manager and note the master password location or who can access it.

Everyday bank:

Branch (if used):

Cards to cancel on passing:

Direct debits & regular payments (summary):

Rent/rates, electricity/gas/water, phone/internet, streaming, insurances, gym, clubs, donations, etc.

Online accounts & portals:

(ATO/MyGov, Super funds, Share registries, Utilities, Email, Cloud storage)

Where are credentials stored?

MFA device/backup codes location:

First Things To Do At The Time of My Passing

This is a **practical checklist** to support your executor or family.

1. Make initial calls

- ☐ Call immediate family / the person listed as **Next of Kin**
- ☐ Call **Executor** and **Solicitor**
- ☐ Contact **preferred funeral home** (Section 15)
- ☐ If employed, **notify employer/HR**

2. Care for dependants and pets

- ☐ Ensure any dependants are safe and supported
- ☐ Arrange pet care (location of vet records/food: _____)

3. Documents & formalities

- ☐ Locate **ID, Will, and medical directives** (see Sections 2 & 6)
- ☐ Arrange **Medical Certificate of Cause of Death** (usually via doctor or hospital)
- ☐ Funeral director to apply for **Death Certificate**

4. Notify key organisations (as applicable)

- ☐ **Centrelink** (age pension, carer, etc.)
- ☐ **Australian Taxation Office** (via MyGov or accountant)
- ☐ **Superannuation funds** (to initiate death benefit claims)
- ☐ **Insurance companies** (life, funeral, health, home/contents, car, income protection)
- ☐ **Banks/credit unions** (freeze accounts as required, open estate account)
- ☐ **Utilities & services** (electricity, gas, water, rates)
- ☐ **Phone/Internet/Streaming** (cancel/transfer)
- ☐ **Clubs & memberships** (sporting/community—see Section 14)
- ☐ **Transport for NSW** (licence, vehicle registration)
- ☐ **Electoral roll** (Australian Electoral Commission)

5. Financial administration

- ☐ Gather asset & liability lists (Sections 8–10)
- ☐ Set up **Estate bank account** if advised by the solicitor
- ☐ Keep receipts & records for the estate (funeral, notices, fees)

6. Legal guidance

- ☐ Work with the **solicitor** to apply for **Probate** (if required) or **Letters of Administration**
- ☐ Executor to follow Will instructions and this document's notes

Notes: _____

Sporting and/or Community Groups

Club/Group	Membership No.	Contact	Fees (auto-renew?)	Notes (keys, uniforms, roles)

Notes: _____

Preferences for Funeral / Celebration of Life

Funeral home (preferred): _____

Prepaid funeral (Y/N): _____ Provider & Contract No.: _____

Type: ☐ Burial ☐ Cremation ☐ Either

Service style: ☐ Religious ☐ Non religious ☐ Memorial only ☐ Private ☐ Public

Venue(s): _____

Officiant/Celebrant: _____

Music/Readings/Hymns: _____

Speakers/Eulogies: _____

Flowers/Donations in lieu: _____

Dress code / Colours: _____

Pallbearers (if any): _____

Ashes (if cremation): _____

Obituary/Death notice preferences: _____

Special rituals/cultural customs: _____

Other wishes: _____

Additional Instructions

Anything not covered on previous page (e.g., online photo albums, social media memorialisation, special bequests, messages).

Digital & Privacy Considerations (Recommended)

- Consider a **password manager**; store the master password access notes with your solicitor or a sealed envelope in a safe.
- Note any **two factor authentication** devices (phone, security keys) and backup codes.
- Provide instructions for **email, social media, and cloud storage** (close, memorialise, or transfer).
- Keep a clean **“final copy”** of this document and **shred old versions**.

Annual Review Checklist

- ☐ Contact details & cards up to date
- ☐ Insurance policies renewed / beneficiaries checked
- ☐ Super funds & binding nominations reviewed
- ☐ Asset & liability balances refreshed
- ☐ Direct debits/subscriptions audited
- ☐ Will & directives still reflect your wishes
- ☐ Funeral preferences still correct
- ☐ Trusted person knows where this document is

Disclaimer

TJ Andrews Funeral Services Pty Ltd has prepared this document as a helpful guide and inventory. It is **not legal advice**. In New South Wales, estate law and advance care planning are specific. Please consult a **solicitor** for your Will, probate queries, and formal directives.



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