

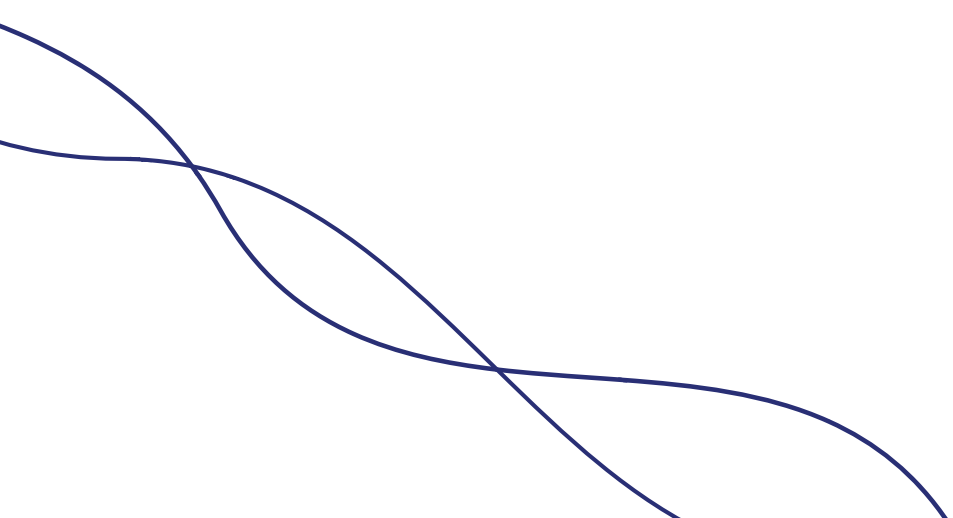
Personal & Estate Information Pack
(New South Wales)





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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: _____

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)

Liabilities (What I Owe)

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

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

Joseph Medcalf Funerals 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.



Joseph **Medcalf**
Funerals

T: (02) 9698 2644

E: director@josephmedcalf.com.au

www.josephmedcalf.com.au

Belmore | Matraville | Redfern | Woolahra

