

# My Personal Estate Details

## INTRODUCTION

### Make a plan for those you leave behind

Contemplating the prospect of departing from our loved ones is undoubtedly challenging. However, you can ease their burden during this difficult time by leaving a plan for them to follow. By completing this paperwork, you ensure your loved ones are equipped with the guidance they need to fulfil your wishes. Consider this act as a final gift, providing both you and your loved ones with peace of mind.

**My Personal Estate Details** is designed to not only provide vital information for your family and friends in the event of a personal emergency or your incapacity, but assist your Executor in the effective administration of your Estate .

We would also like to take this opportunity to say 'thank you' if you are leaving a gift in your Will to Mission Australia. Your kindness and generosity will always ensure there is a way forward to care for the most vulnerable in our communities.

After you've completed the paperwork, keep it in a safe place. You may also want to include other important documentation in the Mission Australia folder.

## MY PERSONAL ESTATE DETAILS DOCUMENT COPY

**Personal information** This personal record was last updated on: \_\_\_\_\_

Full name/assumed name

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Phone number/land-line/mobile

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Date of birth

Passport number

Tax file number

Medicare number

Pensioner card number

Driver's licence number

Centrelink number

Veterans affairs number

Overseas pension details (reference/contact)

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Emergency contact - name/address/phone/relationship

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Pets - vet/ insurance details/pet sitter/plan in place for someone to care for

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## MY PERSONAL ESTATE DETAILS DOCUMENT COPY

### Relationships

Full name of spouse/partner

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Date/place of marriage

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Full name of previous spouse/partner (if applicable)

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Date/place of marriage/divorce

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Next of kin/primary contact (full name)

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Contact details/phone

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### Family history

**(Please provide the name of your parents, their date of birth and where they were born, to be able to apply for a death certificate.)**

Father's full name

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Date of birth/death

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Place of birth

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Mother's full name

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Date of birth/death

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Place of birth

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## MY PERSONAL ESTATE DETAILS DOCUMENT COPY

### Funeral details

Will details/held

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Specific items in your Will to be gifted to someone. Where are these located

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Executor details

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Power of Attorney or Enduring Guardianship details

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Family members/friends to be contacted (name/address/email/phone)

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Registered organ donor details

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Doctor's/specialist details

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Priest/Minister details

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Funeral plan details

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Church Service /Funeral Home service details

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## MY PERSONAL ESTATE DETAILS DOCUMENT COPY

### Funeral details (cont)

Specific hymns/passages/photos/service/ music/flowers preference/memorial donations

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Cremation/burial instructions

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Cremation (ashes to be spread) or burial

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Burial instructions/headstone

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Wake details

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People NOT to be contacted

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Obituary details printed

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### Financial

Accountant's details

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Financial advisor details

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Solicitor's details

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## MY PERSONAL ESTATE DETAILS DOCUMENT COPY

### Financial (cont)

Do you own your own home

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Do you have a mortgage

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People who may have spare keys

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House alarm code

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House insurance details

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Investment property/details

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Car details/insurance

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Boat/trailer/caravan details

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Bank account/s details (bank address/account numbers)

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Investments (share portfolio/property/accounts/time-share)

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Superannuation/life insurance details

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Personal insurance details (health)

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Business/partnership details

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## MY PERSONAL ESTATE DETAILS DOCUMENT COPY

### Financial (cont)

Patents, copyrights, trademarks, or royalties' details

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Details of any debts or mortgages you owe money on and the repayment schedules

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Specific instructions for how to care for specific dependants,  
and or loved ones including those with a disability

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Loans to friends/family members

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Liabilities (personal guarantees)

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Direct debit authorities for credit card/bank account (i.e., donations/payments)

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Credit card details (including store credit cards, After pay or similar)

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Pension payments/accounts/Department of Veterans Affairs

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## MY PERSONAL ESTATE DETAILS DOCUMENT COPY

### My providers

Phone – land-line/mobile

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Internet

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Streaming services (Foxtel/Stan/Netflix/Spotify/Apple music etc)

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Login details to access key digital assets, such as social media and online accounts

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Mowing/handy person service/community providers

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Safety deposit box

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Electricity/gas/water

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## MY PERSONAL ESTATE DETAILS DOCUMENT COPY

### Miscellaneous

Birth certificate/marriage certificate/other documents kept

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Safe/location/key/combo

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Personal jewellery/valuables kept in your house

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Antiques/items of value (sold/kept in family/museum)

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Collections (antiques/stamps/coin)

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Are there hidden spaces in your home i.e. wall/floor cavity

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Family photos given to

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Subscriptions/membership details (club/gyms)

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