

Helpful information for your Executor

As we live our lives we collect information, and many belongings and memories. There are always important things to remember and pass on. Here is a checklist to help remind you of the information your estate executor will need when the time comes.

Personal

- Previous name/Assumed name
- Address
- Postal Address (If different)
- Phone number/landline/mobile
- Date Of Birth
- Place where your original Will is held
- Emergency contact – name/address/phone/relationship
- Advise of any Power of Attorney or Enduring Guardianship established
- Where your animals should go
- Spouse Name (even if they have predeceased you)
- Mother's Name*
- Father's Name*
(To be able to apply for a death certificate)

Funeral Details

- Family members/friends to be contacted (name/address/email/phone)
- If you have registered as an organ donor
- Your doctor's/specialist details
- If you have a funeral plan and if it is prepaid
- If you are to have a church service or a funeral home service
- If you want any specific hymns/passages/photos/service/music/flowers/donations in lieu of flowers
- Cremation/burial instructions
- If you are to be cremated where you would like your ashes placed
- If you are to be buried if you would like a headstone
- If you would like a wake
- People NOT to be contacted
- If you would like an obituary to be printed

Financial

- Your accountant's details
- Your solicitor's details
- If you own your home, your mortgage details
- Provide details of your about who may have some spare keys, alarm codes and insurance details
- Details of any loan or insurance or any car you own
- If you own a Boat/Trailer/Caravan etc
- If so, the details and insurance
- Bank accounts details (bank address/account numbers)
- If you have Investments (Share portfolio/property/accounts/timeshare)
- Any binding nominations on any superannuation/life insurances that may be in place
- If you have Business/partnership
- Details of any patents, copyrights, trademarks or royalties you may have
- Details of any debts or mortgages you owe money on and the repayment schedules
- Specific instructions for how to care for specific dependents, and/or loved ones including those with a disability
- Loans to friends/family members that may need to be called in
- Any liabilities (personal guarantees)
- Any direct debit authorities for credit card/bank account (ie donations/payments)
- Credit card details (including store credit cards, Afterpay or similar)
- Any pension payments/accounts/Department of Veterans Affairs

My Providers

- Details any personal Insurance
- Phone – landline/mobile
- Internet
- Streaming services (Foxtel/Stan/Netflix/Spotify/Apple music etc.)
- Login details to access key digital assets, such as social media and online accounts
- Other providers (Mowing/handy person service/community providers)
- Details of any Safety deposit box
- Electricity/gas/water

Miscellaneous

- Where your birth certificate/marriage certificate/other documents are kept
- Details on how to access any safe you may have
- Where personal jewelry/valuables kept in your house
- Location of any specific item given in your will
- If you have antiques/items of value and what is to be done with them
- Are these to be sold/kept in family/museum?
- Any collections (e.g. antiques/stamps/coin) and what is to be done with them
- Any hidden spaces in your home ie: wall/floor cavity
- If you want your family photos given to anyone
- Any subscriptions/membership details (ie club/gyms) that may need to be cancelled