



CHECKLIST OF YOUR IMPORTANT DOCUMENTS

One of the goals of Chapter 6 is to help create a safety net in case the unexpected happens or to make sure your current safety net is up to date. A good way to think about your safety net is as a way to minimise the disruption that would be caused by a major upheaval.

The below checklist is an example list of important documents that most of us have in place. It is important to keep the original documents in a safe place as well as make a copy, and then provide a copy of this list to a suitable loved one or legal representative.

SINGLE OR COUPLE

First Name: Last Name:

First Name: Last Name:

	LAST UPDATED	LOCATION OF THE ORIGINAL	DO YOU HAVE A COPY
Will	.... /.... /.....		Y / N
Deed of Enduring Guardianship	.... /.... /.....		Y / N
Enduring Power of Attorney	.... /.... /.....		Y / N
Birth certificate	.... /.... /.....		Y / N
Marriage certificate	.... /.... /.....		Y / N
Credit card details	.... /.... /.....		Y / N
Driver license details	.... /.... /.....		Y / N
Insurance policies	.... /.... /.....		Y / N
Investment receipts	.... /.... /.....		Y / N
Mortgage documents	.... /.... /.....		Y / N
Share/bond certificates	.... /.... /.....		Y / N
Super/pension statements	.... /.... /.....		Y / N
Tax records	.... /.... /.....		Y / N
Title records	.... /.... /.....		Y / N
Title deeds	.... /.... /.....		Y / N
Testamentary Trusts	.... /.... /.....		Y / N
Other .....	.... /.... /.....		Y / N
Other .....	.... /.... /.....		Y / N
Other .....	.... /.... /.....		Y / N
Other .....	.... /.... /.....		Y / N



CHECKLIST OF YOUR IMPORTANT PEOPLE

The below checklist is a list of important people to contact in case the unexpected happens (family, friends, employers, professional advisers, medical professionals, etc.). This list is often overlooked as, of course, you know who your contacts are, but does your partner, your adult children and your executors?

Once completed, provide a copy of this list to a suitable loved one or legal representative.

SINGLE OR COUPLE

First Name: **Last Name:**

First Name: **Last Name:**

NAME	FUNCTION (e.g. relationship, input)	PHONE	EMAIL