



Personal & Estate Information Pack  
(Queensland)



Last updated on: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Prepared by: \_\_\_\_\_

# CONTENTS

Biographical Information _____	1
Where are my personal papers kept? _____	2
Important Contacts _____	3
Insurance policies & Superannuation _____	4
Family Health History _____	5
Location of Will, Medical Directives & Legal Documents _____	6
Personal Property (Items and Instructions) _____	7
Assets Overview _____	8
Liabilities (What I owe) _____	10
Amounts owed to me _____	11
Banking and Digital Access Information _____	12
First things to do at the time of my passing _____	13
Sporting and/or community groups _____	14
Preferences for Funeral/Celebration of Life _____	15
Additional Instructions _____	16

# 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)

## 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)
- Department of Transport and Main Roads** (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

Newhaven Funerals Pty Ltd has prepared this document as a helpful guide and inventory. It is **not legal advice**. In Queensland, estate law and advance care planning are specific. Please consult a **solicitor** for your Will, probate queries, and formal directives.



T: 07 3807 4444

E: [admin@newhavenfunerals.com.au](mailto:admin@newhavenfunerals.com.au)

[www.newhavenfunerals.com.au](http://www.newhavenfunerals.com.au)

Stayptlon | Burleigh Heads