

Personal Record

of

.....

*Information to be kept with my
Last Will & Testament*

.....

(Signature)

Date prepared:...../...../.....

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My Personal Record

Full name:

.....
.....

Address:

.....
.....
.....

Date of birth:...../...../..... Place of birth:.....

Family information

Marriage / Relationship details:

Spouse's name:.....(Maiden name:.....)

Place of Marriage:.....Date of marriage:...../...../.....
Date of cohabitation:...../...../.....

My parents:

Father's name:.....

Address:.....

Mother's name:.....

Address:.....

If either parent deceased, medical reason for death

.....
(In case of illness, it is sometimes helpful to know your family's medical history)

My Children:

Name:.....

Address:.....

Date of birth:...../...../.....Place of birth:.....

Name:.....

Address:.....

Date of birth:...../...../.....Place of birth:.....

Name:.....

Address:.....

Date of birth:...../...../.....Place of birth:.....

(If there are more children, please print this page twice and insert extra pages)

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My important information

Passport No:.....Medicare No:.....

Health Insurance Fund:.....Policy No:.....

Safe Deposit Box No:.....Located at:.....Key:.....

Bank Accounts:

Bank:.....Branch:.....Account No:.....

In the name(s) of:.....

Type: Savings Cheque Credit Term Deposit Investment

Bank:.....Branch:.....Account No:.....

In the name(s) of:.....

Type: Savings Cheque Credit Term Deposit Investment

Bank:.....Branch:.....Account No:.....

In the name(s) of:.....

Type: Savings Cheque Credit Term Deposit Investment

Insurances:

Company:.....Owner:.....Policy No:.....

Beneficiary:.....Cash Value:.....

Type: Life Home Contents Other:.....

Company:.....Owner:.....Policy No:.....

Beneficiary:.....Cash Value:.....

Type: Life Home Contents Other:.....

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(Please attach extra pages if necessary)

Details of my Will

- I have made a Will. My Will is located
-
- As of the date of completing this booklet I had not made a Will, but I plan to make one as I realise that without a Will the government or courts will decide how my assets will be distributed.

My next of Kin

Important names & addresses:

Full name of my next of kin OR closest friend is:

.....

Address:.....

.....State:.....Postcode:.....

Telephone:.....Relationship:.....

My Doctor is:.....

My Accountant is:.....

My Solicitor is:.....

My Minister of Religion is:.....

My Insurance Agent is:.....

I have a Funeral Policy/Plan with:.....

.....

.....

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People/organisations to notify upon my death

Individuals:

Name:.....Phone:.....

Address:.....

Name:.....Phone:.....

Address:.....

Name:.....Phone:.....

Address:.....

Name:.....Phone:.....

Address:.....

Clubs / Organisations:

Name:.....Phone:.....

Address:.....Member No:.....

Name:.....Phone:.....

Address:.....Member No:.....

Name:.....Phone:.....

Address:.....Member No:.....

Name:.....Phone:.....

Address:.....Member No:.....

Name:.....Phone:.....

Address:.....Member No:.....

My Assets

My Personal Assets:

Item	Cost	Est Value if sold	Mortgage or Loan	Net Value
My home				
Other Real Estate property (addresses)				
Furniture				
Cars, Boats, Caravans etc				
Appliances (TV, Video, Computer, Camera, Stereo etc)				

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Downloaded free from www.rodstorie.com.au – Form designed by Roderick Storie Solicitors,
62-64 George Street, Windsor NSW Australia
Tel: 61 2 4587 7906 Fax: 61 2 4577 6452
E-mail: mail@rodstorie.com.au

My Personal Assets (cont...)

Jewellery	
Books, Artworks etc	
Silverware, Crystal, Crockery etc	
Collections (stamps, coins, miniatures etc)	
Other personal property	
Total Personal Assets	\$

My Financial Assets...

Bank & Building Society Accounts	
Bonds, Shares & Debentures	
Mortgages Held	
Loans etc. Due to me, less loans due to others	
Superannuation / Retirement Funds	
Total Financial Assets	\$
Grand Total Net Assets	\$
Less any other loans, debts or credit card balances	-\$
Total Estimated Value of my Estate	\$
(When you consider your total net assets, you will no doubt be surprised at the value of the goods & assets you actually own!)	

Special Arrangements

(PLEASE NOTE: The information on this page indicates the individual person's wishes only.
Completion of this section does not constitute a legally binding document)

In relation to my death...

- I have made arrangements for my funeral*
Details:.....
- I have made **no** arrangements for my death or funeral.*
- I would like afuneral service*
(Please indicate faith)
- I wish to be cremated*
- I wish to be buried*
- I wish to donate my organs*
- I **do not** wish to donate my organs*
- I **do not** wish my life to be prolonged by life support systems*
- I have joined a Funeral Fund*
Details:.....

Notes

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Frequently Asked Questions

- ***Is filling in this booklet the same as making a will?***
No. This booklet is intended only as a helpful instrument for your family or executors of your estate. You should have a Will drafted to ensure your estate is distributed the way you intended.

- ***Is my family or executor legally bound by law to carry out the instructions in this booklet?***
No. The instructions you leave in this booklet are not legally binding and are only intended as a helpful guide to your wishes.

- ***What other things should I keep in a safe place to make administering my estate easier?***
 - Birth Certificate
 - Marriage Certificate
 - Divorce papers
 - Parent's birth Certificates
 - Property documents (eg: Deeds etc)

- ***Where should I keep my Will, this booklet and other important documents?***
You should ensure that all your important documents are held in a safe place. Your solicitor should be able to assist you with "safe custody", otherwise most banks offer document services/safety deposit boxes.

- ***How can my Executor find my Will and other documents?***
If you have no other arrangements for notifying your family or executor where they can find your important documents, the NSW Registry of Births, Deaths & Marriages now has a "Will Register". The Wills Register records the location of a Will. The Register enables you to record where the Will is kept, who made the Will and who is Executor named in the Will (the person responsible for carrying out your wishes). The Registry does not need to see a copy of the Will, nor does it store the Will. Your solicitor should be able to assist you either with contact information for this service, or organise the registration for you. If you live outside of NSW, Australia – please contact your local records management authority for a list of their services.

- ***What should I do if I have more questions regarding my Will?***
The best thing to do is make an appointment to see a solicitor.

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