



Assemble your documents

These are some of the main documents and details you need to find and put together:

- your will
- birth, marriage, divorce and citizenship certificates
- bank and credit card information
- Passport
- investment details (e.g. shares, funds, trusts)
- life insurance information
- superannuation information
- other insurance information
- lease documents
- mortgage and loan details (e.g. house, car, etc)
- receipts and appraisals for valuables
- tax information
- private health insurance information
- Centrelink and Medicare details
- decision making documents eg. Power of Attorney, enduring guardian, advanced care directive.
- a list of all your user names and passwords for important services you perform online
- names and contact details for your lawyer, financial planner, tax advisor, broker and anyone else with knowledge of - or control over - wills and finances
- funeral information – including any plans made, wishes etc not included in your will

