

Personal Records Checklist



Nillumbik Shire Council's Positive Ageing Reference Group has developed this tool to help you think about and keep track of your important information and documents. While it may take a little while to complete, spending time now can help you identify areas you have not considered and potentially reduce any issues your family or friends may have in the future.

You can download this document from Council's website www.nillumbik.vic.gov.au or request a hard copy by contacting Council's Positive Ageing Officer on 9433 3348 or positive.ageing@nillumbik.vic.gov.au

Nillumbik Shire Council makes no warranty and accepts no liability for any use of, or reliance on, any information in this document. Owners of this document are encouraged to keep your personal information as up to date as possible and make changes when and where necessary.

Your details

Name:

Primary contact:

Relationship:

Phone:

Important contacts

Phone

Family Doctor:

Medical Power of Attorney:

Enduring Power of Attorney:

Enduring Power of Guardianship:

Will is with solicitor/trust company:

Accountant:

Financial advisor:

Funeral company with whom details have been arranged:

Cemetery with whom details have been arranged:

Someone I trust knows the location of the following documents:

Documents		Notes
Birth certificate	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Marriage certificate	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Passport(s)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Citizenship document(s)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Bank account(s)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Life insurance	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Death and disability insurance	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Income insurance	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Medicare card	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Private health insurance	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Pension card	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Superannuation and pension fund(s)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Original and copies of your will	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Service record and discharge certificate	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Real estate property(s) owned	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Home insurance policy(s)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Motor vehicle(s) owned	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Motor vehicle insurance policy(s)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Other assets (securities, shares, bonds, etc.)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
My wishes and specific funeral instructions	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

Additional notes

