

ESTATE PLANNING DIRECTORY

Cents OF WORTH

Purpose of this Directory

The Estate Directory is designed to help you organise critical personal information to be used at a time when it is needed the most.

Documenting the data now will prepare others to assist with your affairs in the event of a severe disability, major illness or untimely death. This Estate Directory will help you to quickly locate the important personal papers and details at a time when things are already complicated enough.

The benefit of this type of advance planning is enormous, and people who would ordinarily be overlooked can be immediately contacted.

Please take the time and care to complete these details accurately and thoroughly. When the time comes time to use this form in assisting others with your affairs, you may be unable to provide any input.

This directory should be left with an adviser, and someone you trust, and its whereabouts could be identified on a card you carry with you.

Personal Information

Your details

Full Name:		Spouse/Partner Name:	
Date of Birth:		Date of Birth:	
Birthplace:		Birthplace:	
Life Insurance Company/s:		Life Insurance Company/s:	
Policy Number/s:		Policy Number/s:	
Employer Company Name:		Employer Company Name:	
Key Contact Person:		Key Contact Person:	
Phone Number:		Phone Number:	
Email Address:		Email Address:	

Your children

Child's Name:		Child's Name:	
Date of Birth:		Date of Birth:	
Birthplace:		Birthplace:	
Phone Number:		Phone Number:	
Child's Name:		Child's Name:	
Date of Birth:		Date of Birth:	
Birthplace:		Birthplace:	
Phone Number:		Phone Number:	

In case of an emergency the contacts are

Name:		Name:	
Relationship:		Relationship:	
Phone Number:		Phone Number:	
Email Address:		Email Address:	
Address:		Address:	

Advisers to Consult or Notify

Lawyer

Name:	
Company Name:	
Phone Number:	
Email Address:	
Address:	

Accountant

Name:	
Company Name:	
Phone Number:	
Email Address:	
Address:	

Insurance Adviser

Name:	
Company Name:	
Phone Number:	
Email Address:	
Address:	

Investment Adviser

Name:	
Company Name:	
Phone Number:	
Email Address:	
Address:	

Family Doctor

Name:	
Company Name:	
Phone Number:	
Email Address:	
Address:	

Executor – Wills and/or Trust

Name:	
Company Name:	
Phone Number:	
Email Address:	
Address:	

Other, please state

Name:	
Company Name:	
Phone Number:	
Email Address:	
Address:	

Other, please state

Name:	
Company Name:	
Phone Number:	
Email Address:	
Address:	

Legal Matters

Current Will

In Place?	
Last Reviewed:	
Held by:	

Enduring Power of Attorney

In Place?	
Last Reviewed:	
Held by:	

Family Trust

In Place?	
Name of Trust:	
Trustees:	

Family Trust

In Place?	
Name of Trust:	
Trustees:	

Notes

Relatives to Notify

Relatives will normally notify each other quite rapidly in the event of an emergency or untimely event. Most people simply list the few relatives that will notify the rest. We have left a full page for relatives and suggest you list your parents, brothers and sisters, or other family members you want to be contacted.

Family Member

Name:
Relationship:
Phone Number:
Email Address:
Address:

Family Member

Name:
Relationship:
Phone Number:
Email Address:
Address:

Family Member

Name:
Relationship:
Phone Number:
Email Address:
Address:

Family Member

Name:
Relationship:
Phone Number:
Email Address:
Address:

Family Member

Name:
Relationship:
Phone Number:
Email Address:
Address:

Family Member

Name:
Relationship:
Phone Number:
Email Address:
Address:

Other Important People to Notify

List friends and acquaintances that are meaningful to you. Many of these people would normally get overlooked in the event of an emergency notification. These could be your closest friends and those living overseas.

Other

Name:	
Relationship:	
Phone Number:	
Email Address:	
Address:	

Other

Name:	
Relationship:	
Phone Number:	
Email Address:	
Address:	

Other

Name:	
Relationship:	
Phone Number:	
Email Address:	
Address:	

Other

Name:	
Relationship:	
Phone Number:	
Email Address:	
Address:	

Other

Name:	
Relationship:	
Phone Number:	
Email Address:	
Address:	

Other

Name:	
Relationship:	
Phone Number:	
Email Address:	
Address:	

Location of Documents

Filing systems and online information are often designed to suit personal needs and are not necessarily as clear to another person as they are to the creator of the system. Begin by identifying where your home, office and safekeeping files are located. Then identifying in which location each specific document can be found. Use “Other” to specify if one of these three locations is not applicable.

A	Documents in my home are located:	
B	Documents in my office are located:	
C	My safe deposit box is located:	
D	Financial Institution:	

	A	B	C	D	Other	
Will						
Income Tax Returns						
Marriage Certificate						
Birth Certificate						
Passport/Citizenship						
Business/Shareholder Agreements						
Investments Held						
Real Estate documents						
Outstanding Loan information						
Funeral Arrangements						
Insurance documents						
Credit Cards						
Personal Valuables/Heirlooms						
How to locate online passwords						

Online Public Profiles to be disabled:

Facebook:		
LinkedIn:		
Twitter:		
Instagram:		
Other:		

Notes or Special Instructions

Notes



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