























# My Estate Planning Profile

<b>NAME:</b>	<b>DATE OF BIRTH:</b>	<b>CURRENT DATE:</b>
<b>TAX FILE NUMBER (TFN) :</b>	<b>CENTRELINK REFERENCE NUMBER (CRN) :</b>	

DETAILS	MY FAMILY				
Name					
Relationship					
Contact	 :	 :	 :	 :	 :
	@:	@:	@:	@:	@:
	 :	 :	 :	 :	 :

DETAILS	MY ADVISERS		
	Financial Adviser	Solicitor	Accountant
Role			
Adviser name			
Business name	Muirfield Financial Services		
Adviser Contact	 : 03 5224 2700	 :	 :
	@: mfs@muirfieldfs.com.au	@:	@:
	 : 2/17-19 Fenwick St, Geelong, VIC 3220	 :	 :
Support provided	<input type="checkbox"/> Superannuation <input type="checkbox"/> Investment <input type="checkbox"/> Annuity	<input type="checkbox"/> Will <input type="checkbox"/> Power of Attorney <input type="checkbox"/> Business arrangements	<input type="checkbox"/> Income tax returns <input type="checkbox"/> Superannuation (SMSF) <input type="checkbox"/> Business taxation

DETAILS	MY ESTATE PLANNING ARRANGEMENTS		
Item	WILL	POWER OF ATTORNEY (POA)	
		Medical	<input type="checkbox"/> Financial <input type="checkbox"/> Enduring
Last updated			
Storage Location			
Executor/ Attorney name			
Executor / Attorney Contact information	 :	 :	 :
	@:	@:	@:
	 :	 :	 :
Testamentary Trust	Yes <input type="checkbox"/> No <input type="checkbox"/>		
Funeral bond	Yes <input type="checkbox"/> No <input type="checkbox"/>	Provider:	Amount:
DETAILS	MY ASSETS		
Item:	Owned by:	Value:	Details:
DETAILS	MY LIABILITIES		

DETAILS	MY SUPERANNUATION		
Fund name:	Owner:	Amount:	Details:
			<input type="checkbox"/> Beneficiary:
			<input type="checkbox"/> Beneficiary:
			<input type="checkbox"/> Beneficiary:

DETAILS	MY INCOME		
Type:	Provider:	Amount:	Details:

DETAILS	MY INSURANCE		
Policy type:	Owned by:	Value:	Details:

DETAILS	FUNERAL ARRANGEMENTS		
Item:	Owned by:	Value:	Details:
Plot Location			
Funeral Bond / Plan			Policy held via:

## MY NOTES


## MY CHECKLIST

Some other things you may wish to let your family or executor know about.

- ☐ A list of usernames and passwords for your online accounts.
- ☐ A list of direct debits that come from your bank account/s.
- ☐ A list of payments that go into your bank account/s.
- ☐ A list of subscriptions / memberships and organisations you have an account with.
- ☐ A list of any cash or items you may have hidden.
- ☐ A list of things / money you may have loaned to people.
- ☐ A list of things you would like at your funeral (people / songs etc).
- ☐ A list of care requirements for any pets or possessions.

☐

☐
