|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| NAME: | | | | |  | DATE OF BIRTH: | | | CURRENT DATE: | |
| TAX FILE NUMBER (TFN) : | | | | |  | CENTRELINK REFERENCE NUMBER (CRN) : | | | | |
|  | | | | | | | | | | |
| DETAILS |  | MY FAMILY | | | | | | | | |
| Name |  |  |  | | | |  |  | |  |
| Relationship |  |  |  | | | |  |  | |  |
| Contact |  | 🕾: | 🕾: | | | | 🕾: | 🕾: | | 🕾: |
|  | @: | @: | | | | @: | @: | | @: |
|  | 🖂: | 🖂: | | | | 🖂: | 🖂: | | 🖂: |
|  | | | | | | | | | | |
| **DETAILS** |  | **MY ADVISERS** | | | | | | | | |
| Role |  | **Financial Adviser** | | **Solicitor** | | | | **Accountant** | | |
| 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 |  | 🞏 Superannuation  🞏 Investment  🞏 Annuity | | 🞏 Will  🞏 Power of Attorney  🞏 Business arrangements | | | | 🞏 Income tax returns  🞏 Superannuation (SMSF)  🞏 Business taxation | | |
|  | | | | | | | | | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| DETAILS |  | MY ESTATE PLANNING ARRANGEMENTS | | |
| Item |  | WILL | POWER OF ATTORNEY (POA) | |
|  | Medical | 🞏 Financial 🞏 Enduring |
| Last updated |  |  |  |  |
| Storage Location |  |  |  |  |
| Executor/ Attorney name |  |  |  |  |
| Executor / Attorney  Contact information |  | 🕾: | 🕾: | 🕾: |
|  | @: | @: | @: |
|  | 🖂: | 🖂: | 🖂: |
| Testamentary Trust |  | Yes 🞏 No 🞏 |  | |
| Funeral bond |  | Yes 🞏 No 🞏 | Provider: | Amount: |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| DETAILS |  | MY ASSETS | | |
| **Item:** |  | **Owned by:** | **Value:** | **Details:** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **DETAILS** |  | **MY LIABILITIES** | | |
|  |  |  |  |  |
|  |  |  |  |  |
|  | | | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| DETAILS |  | MY SUPERANNUATION | | |
| **Fund name:** |  | **Owner:** | **Amount:** | **Details:** |
|  |  |  |  | 🞏 Beneficiary: |
|  |  |  |  | 🞏 Beneficiary: |
|  |  |  |  | 🞏 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. |
| 🞎 |
| 🞎 |
|  |
|  |