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

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| DETAILS |  | MY ASSETS  |
| **Item:** |  | **Owned by:** | **Value:** | **Details:** |
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| **DETAILS** |  | **MY LIABILITIES** |
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| DETAILS |  | MY SUPERANNUATION |
| **Fund name:** |  | **Owner:** | **Amount:** | **Details:** |
|  |  |  |  |  🞏 Beneficiary: |
|  |  |  |  |  🞏 Beneficiary: |
|  |  |  |  |  🞏 Beneficiary: |

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| --- | --- | --- |
| DETAILS |  | MY INCOME |
| **Type:** |  | **Provider:** | **Amount:** | **Details:** |
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| DETAILS |  | MY INSURANCE |
| **Policy type:** |  | **Owned by:** | **Value:** | **Details:** |
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| DETAILS |  | FUNERAL ARRANGEMENTS |
| **Item:** |  | **Owned by:** | **Value:** | **Details:** |
| Plot Location |  |  |  |  |
| Funeral Bond / Plan |  |  |  | Policy held via:  |
|  |  |  |  |  |

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| MY NOTES |
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| 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.  |
| 🞎 |
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