

FIRST THINGS FIRST CHECKLIST



We've created this quick reference checklist to help you should the unexpected happen. In the event you need help in managing your personal admin, your loved ones or trusted adviser can locate your details easily to act or manage things on your behalf. You may wish to provide a copy to your solicitor and attorney. You can complete the checklist online and save a copy to print, or if you prefer hand write the details.

It's important to keep this checklist along with all your personal and financial documents stored safely and securely.

Private and confidential
If found please return to:

My contacts

Executor

Name	Business name
Phone	Email
Postal address	

Accountant

Name	Business name
Phone	Email
Postal address	

Enduring Attorney - Power of Attorney (POA)

Name	Business name
Phone	Email
Postal address	

Enduring Guardian

Name	Business name
Phone	Email
Postal address	

My contacts continued

Financial Planner

Name	Business name
Phone	Email
Postal address	

Trusted Friend

Name	Business name
Phone	Email
Postal address	

Important numbers

Tax File Number	Medicare
Social Security	Other

Facebook

Username	Password
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Twitter

Username	Password
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Other

Username	Password
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Gather the following personal documents and keep them in a folder

Signed will	<input type="checkbox"/>
Signed Enduring Power of Attorney/Power of Attorney/Enduring Guardian	<input type="checkbox"/>
Signed Advanced Health Directive or Advance Care Plan	<input type="checkbox"/>
Birth certificate, marriage certificate, divorce decree (where relevant)	<input type="checkbox"/>
Copy of passport and driver's licence	<input type="checkbox"/>
Property deeds	<input type="checkbox"/>
Bank statements	<input type="checkbox"/>
A copy of each utility statement	<input type="checkbox"/>
Superannuation statements	<input type="checkbox"/>
Insurance policy information and statements	<input type="checkbox"/>
Investment statements	<input type="checkbox"/>
Your funeral wishes	<input type="checkbox"/>
Funeral arrangement details (Prepaid funeral plan) (if applicable)	<input type="checkbox"/>
Statement of financial position	<input type="checkbox"/>

Things to note: We recommend that you store this checklist and the information you've collated securely in a safe place to protect your privacy and prevent misuse or unintended disclosure of your personal information. This includes taking care when making copies or sending a copy via email. Westpac will never ask to see or that you provide us or any third party with a copy of this checklist. The checklist is your own personal record and should only be shared with your solicitor, Power of Attorney or someone you trust.