

Checklist

ESTATE ADMINISTRATION

- Current will (secure any earlier wills or testamentary documents)
- Funeral Account
- Death Certificate
- List of assets and liabilities
- Photographic identification (e.g. driver's licence, passport) of executor/proposed administrator
- Full names, addresses of persons named in the will (if known).
If there is no will, names and addresses of next-of-kin.

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Checklist

ESTATE ADMINISTRATION ASSET DETAILS

- Financial plan (if any)
- Title deed(s)/search for home owners.
Rental agreements for tenants.
- House insurance policy
- Utility accounts (rates, telephone, mobile,
internet, electricity, gas)
- Bank, Building Society or Credit Union
passbooks, cheque books, bank statements,
access cards, Term deposit certificates
- Credit cards, store cards & cash cards
- Digital wallet and keys for cryptocurrency,
exchange records, receipts for purchase or
transfer
- Life insurance policy and last annual
statement
- Motor vehicle - registration details, insurance,
roadside assistance

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ESTATE ADMINISTRATION

■ Pension Number/ Veterans Affairs' Number, concession card, annual statement of benefits

■ Last income tax return & assessment

■ Employment details and last payslip

■ Life insurance policy and last annual statement

■ Medicare Card / Private Health Fund details

■ Funeral Bond/Funeral Plan details

■ Licences - vehicle, boating, firearms

■ Passport, birth certificate

■ Bonds, Debentures, share certificates

■ Tax agent, accountant, stockbroker, financial planner

■ Partnership/company/trust details/ ABN

■ Superannuation fund annual statement(s), Trust deed (if self-managed super fund)

■ Current Family Court Orders/ Child Support Agreements

■ Names and addresses of your accountant, financial advisor and stockbroker

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DIGITAL RECORDS AND ESTATE ADMINISTRATION

■ Have you secured the deceased person's computer, tablet or smart phone?

Some items to consider are:

- photographs, videos, music, e-books, documents, blogs, movies
- social media accounts
- intellectual property rights
- digital currency
- emails & electronic conversations
- games
- bank accounts including PayPal
- on-line store credits
- medical records and any other electronic record.

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