

Checklist

ESTATE PLANNING

- Current will
- Birth Certificate
- Marriage Certificate & divorce papers (if applicable)
- List of assets and liabilities
- Photographic identification (e.g. driver's licence, passport)
- Full names, addresses and dates of birth of family members
- Full names, addresses of proposed executors, beneficiaries and guardians of children under 18 years of age
- Names and addresses of your accountant, financial advisor and stockbroker

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Checklist

ESTATE PLANNING

- Financial plan (if any)
- Title deed(s)/search
- Life insurance policy and annual statement
- Superannuation fund annual statement(s)
- Superannuation death benefit beneficiary nomination
- Trust deed(s) including self-managed superannuation trust funds
- Company constitution and details of current office bearers and shareholders
- Partnership agreement
- Business succession plan (if any)
- Financial statements for trusts, private companies and partnerships
- Property settlement orders, binding financial agreement, cohabitation agreement or separation agreement
- Child Support agreement

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Checklist

DIGITAL RECORDS AND ESTATE PLANNING



Do you have a computer, tablet or smart phone?



Do you have specific wishes about what is to happen to those devices (and any of the information that is stored on them) if you lose mental capacity or die?



Do you use any internet services or have any on-line accounts? (e.g. an email account)



Do you have specific wishes about what is to happen to those services or accounts if you lose mental capacity or die?



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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