Personal Records Checklist

Nillumbik Shire Council’s Positive Ageing Reference Group has developed this tool to help you think about and keep track of your important information and documents. While it may take a little while to complete, spending time now can help you identify areas you have not considered and potentially reduce any issues your family or friends may have in the future.

Name:

Primary contact:  
Relationship:  
Contact Number:

Family Doctor: Phone  
Medical Power of Attorney: Phone  
Enduring Power of Attorney: Phone  
Enduring Power of Guardianship: Phone  
Will is with solicitor/trust company: Phone  
Accountant: Phone  
Financial Advisor: Phone  
Funeral company with whom details have been arranged: Phone  
Cemetery with whom details have been arranged: Phone

Someone I trust knows the location of the following documents  
Birth certificate ❑ yes ❑ no ❑ N/A   
Marriage certificate ❑ yes ❑ no ❑ N/A   
Passport(s) ❑ yes ❑ no ❑ N/A   
Citizenship document(s) ❑ yes ❑ no ❑ N/A   
Bank account(s) ❑ yes ❑ no ❑ N/A   
Life insurance ❑ yes ❑ no ❑ N/A   
Death and disability insurance ❑ yes ❑ no ❑ N/A   
Income insurance ❑ yes ❑ no ❑ N/A   
Medicare card ❑ yes ❑ no ❑ N/A   
Private health insurance ❑ yes ❑ no ❑ N/A   
Pension card ❑ yes ❑ no ❑ N/A   
Superannuation and pension fund(s) ❑ yes ❑ no ❑ N/A   
Original and copies of your will ❑ yes ❑ no ❑ N/A   
Service record and discharge certificate ❑ yes ❑ no ❑ N/A   
Real estate property(s) owned ❑ yes ❑ no ❑ N/A   
Home insurance policy(s) ❑ yes ❑ no ❑ N/A   
Motor vehicle(s) owned ❑ yes ❑ no ❑ N/A   
Motor vehicle insurance policy(s) ❑ yes ❑ no ❑ N/A   
Other assets (securities, shares, bonds, etc…) ❑ yes ❑ no ❑ N/A   
My wishes and specific funeral instructions ❑ yes ❑ no ❑ N/A

You can download this document from Council’s website [www.nillumbik.vic.gov.au](http://www.nillumbik.vic.gov.au) or request a hard copy by contacting Council’s Positive Ageing Officer on 9433 3348 or [positive.ageing@nillumbik.vic.gov.au](mailto:positive.ageing@nillumbik.vic.gov.au)

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