

# Information for my family

## **ESTATE PLANNING BOOKLET**

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Peace of mind for your family  
so they'll have what they need when the time comes.



PO Box 170 Urunga NSW 2455

[hello@copelandlegal.com.au](mailto:hello@copelandlegal.com.au)

[www.copelandlegal.com.au](http://www.copelandlegal.com.au)

0491 026 03

## Information for my family.

MY DETAILS		
<b>Full legal name:</b>		
<b>Surname at birth:</b>		
<b>Address:</b>		
<b>Occupation:</b>		
<b>Birth details:</b>	Date of birth:	Place of birth:
<b>Who are my emergency contacts?</b>	Name:	Phone:
	Name:	Phone:
	Name:	Phone:
<b>Where is my original Will?</b>		
<b>Where is my original Power of Attorney + Enduring Guardianship?</b>		
<b>Where is my original Advanced Healthcare Directive?</b>		
MY PARENTS		
<b>Father</b>	Full legal name:	
	Surname at birth:	
	Date of birth:	
<b>Mother</b>	Full legal name:	
	Surname at birth:	
	Date of birth:	

MARRIAGES (if applicable)		
<b>1<sup>st</sup> Marriage</b>	Spouse name:	
	Date of Marriage:	
	Date of divorce (if applicable):	
<b>2<sup>nd</sup> Marriage</b>	Spouse name:	
	Date of Marriage:	
	Date of divorce (if applicable):	
<b>3<sup>rd</sup> Marriage</b>	Spouse name:	
	Date of Marriage:	
	Date of divorce (if applicable):	
MEDICAL		
<b>My treating doctor</b>	Name:	
	Medical practice:	
	Contact details:	
<b>My medical specialist</b>	Name:	
	Medical practice:	
	Contact details:	
<b>My health insurance</b>	Name:	
	Policy type:	
	Account details:	
ASSETS		
<b>Real Estate Property 1</b>	Address:	
	Owned with someone else?	
	Value: \$	Strata Manager:
	No mortgage, deed held by:	
	Details of mortgage (if any):	
	Property Insurer:	

<b>Real Estate Property 2</b>	Address:	
	Owned with someone else?	
	Value: \$	Strata Manager:
	No mortgage, deed held by:	
	Details of mortgage (if any):	
	Property insurer:	
<b>Real Estate Property 3</b>	Address:	
	Owned with someone else?	
	Value: \$	Strata Manager:
	No mortgage, deed held by:	
	Details of mortgage (if any):	
	Property insurer:	
<b>Motor vehicles</b>	Make + model:	
	Owned with someone else?	
	Insurer:	
	Make + model:	
	Owned with someone else?	
	Insurer:	
<b>Bank Accounts</b>	Bank:	
	Account number/s:	
	Names on account/s:	
	Bank:	
	Account number/s:	
	Names on account/s:	

<b>Bank Accounts (continued)</b>	Bank:
	Account number/s:
	Names on account/s:
	Bank:
	Account number/s:
	Names on account/s:
	Bank:
	Account number/s:
	Names on account/s:
<b>Investments</b>	Investment company:
	Account number/s:
	Names on account/s:
	Investment company:
	Account number/s:
	Names on account/s:
	Investment company:
	Account number/s:
	Names on account/s:
<b>Shares</b>	Company name:
	Security Ref Number (SRN):
	Owned with someone else?
	Company name:
	Security Ref Number (SRN):
	Owned with someone else?

<b>Shares (continued)</b>	Company name:
	Security Ref Number (SRN):
	Owned with someone else?
	Company name:
	Security Ref Number (SRN):
	Owned with someone else?
	Company name:
	Security Ref Number (SRN):
	Owned with someone else?
	Company name:
	Security Ref Number (SRN):
	Owned with someone else?
	Company name:
	Security Ref Number (SRN):
	Owned with someone else?
<b>Superannuation</b>	Name of super:
	Account number:
	Death nomination?
	Name of super:
	Account number
	Death nomination?



MONEY OWED TO ME	
<b>Debtor 1</b>	Name of debtor:
	Amount owing:
	Details of loan:
<b>Debtor 2</b>	Name of debtor:
	Amount owing:
	Details of loan:
<b>Debtor 3</b>	Name of debtor:
	Amount owing:
	Details of loan:
MONEY I OWE	
<b>Creditor 1</b>	Name of creditor:
	Account number:
	Amount owing:
<b>Creditor 2</b>	Name of creditor:
	Account number:
	Amount owing:
<b>Creditor 3</b>	Name of creditor:
	Account number:
	Amount owing:
<b>Creditor 4</b>	Name of creditor:
	Account number:
	Amount owing:



<b>TAX + INCOME</b>	
<b>Tax</b>	Name of accountant:
	Contact details:
	Name of financial planner:
	Contact details:
<b>Employment</b>	Name of employer:
	Address:
<b>DIGITAL FINGERPRINT</b>	
<b>Email</b>	Email address:
	Email host:
	Password:
	Email address:
	Email host:
	Password:
<b>Social Media</b>	Facebook username:
	Facebook password:
	Instagram username:
	Instagram password:
	LinkedIn username:
	LinkedIn password:
	Twitter username:
	Twitter password:
<b>Other online accounts</b>	Type of account:
	Username:
	Password:

