

End of Life

PLANNING CHECKLIST & WORKSHEET



It is difficult to talk about death and dying with loved ones. This document supports those facing the end of their life by providing:

- A Checklist with reminders of tasks to be completed; and
- A Worksheet to collect the important information which may be required by an executor or family members after death.

The Checklist and Worksheet are not legal documents. They should, however, be completed confidentially and stored together with a Will in a secure and private location until required.

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PLANNING CHECKLIST

Prepare Legal Documents

- Will
- Advance Care Directive
- Enduring Power of Attorney
- Superannuation Binding Death Benefit Nominations
- Organ Donation Registration
- Body Donation Consent Form

Making Administration Easier

- Roll superannuation into a single account (consider life insurance implications)
- Close unrequired bank accounts
- List the preferred distribution of personal items which are not addressed in a Will
- Make gifts of items prior to passing (consider tax implications)
- Provide instructions on how email, social media and online storage accounts are to be dealt with

List Important Information

- Login details and passwords
- Cryptocurrency access
- Membership organisations
- Subscription services
- Utilities and bills (email/post)
- Assets and liabilities list
- Safety deposit box and safe locations
- Location of important documents

Consider completing the Planning Worksheet

Gather Important Documents

- Superannuation statements
- Life insurance policies
- Bank statements
- Asset purchase documents for capital gains tax purposes
- Residential leases / retirement home contracts
- Loan documents
- Birth/marriage certificates, passports

Funeral Planning

- Funeral insurance or prepaid funeral plan
- Contact spiritual adviser
- Express preferences for burial/cremation, funeral service, charity in lieu of flowers
- Pallbearers
- Guests to be invited

Personal Arrangements

- Care of children
- Arrangements for pets
- Stored reproductive material (i.e. IVF)
- Letters to persons of significance / video legacies

End of Life Preferences

- Who should be present
- Location
- Other preferences i.e. music to be played
- List of persons to be notified on passing



PLANNING WORKSHEET

This Worksheet may be completed to provide the important information likely to be required by an executor or family members following the death of a loved one. Some items may not be applicable and can simply be left blank. If more space is required to answer any question, provide the details on a separate sheet and attach it to the Worksheet or use the notes section on page 12.

Full Name

.....

DOB

Personal Arrangements

Care of Children

.....

.....

.....

.....

Care of Pets

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Stored Reproductive
Material (i.e. IVF)

.....

.....

Important Information

Will Located Executor

.....

Advance Care Directive Located Decision maker(s)

.....

.....

Enduring Power of Attorney Located Attorney

.....

Superannuation Fund - Binding Death Benefit Nominations Yes No

..... Date :

..... Yes No

..... Date :

..... Yes No

..... Date :

Organ Donation Consent Yes No Registered Yes No

Body Donation Consent Yes No Registered Yes No

Funeral Insurance Policy Number

.....

.....

End of Life Preferences

Preferred Location

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Who to be Present

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Other Preferences

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Persons to be Notified of Passing

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Funeral Preferences

Spiritual Advisor

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Burial

Cremation

Body Donation

Headstone / Ashes

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Type of Service

.....

Charity in Lieu of Flowers

Yes

No

Charity

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Eulogy

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Pallbearers

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Details of Assets

Real Estate - Properties

Address

Purchase Documents Located

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Bank Accounts

Bank or Credit Union

Account Numbers

Statements Located

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Details of Assets

Superannuation and Life Insurance

Fund	Member / Policy Number	Statements / Policy Located
.....
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Vehicle / Boats / Trailers / Caravans

Vehicle	Registration Number	Registration Notice Located
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Other Asset (i.e Shares)

Item	Description	Document Located
.....
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Details of Liabilities

Mortgages and Loans

Bank or Lender	Account Number(s)	Statements Located
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.....
.....

Credit Cards

Bank or Lender	Account Number(s)	Statements Located
.....
.....
.....
.....

Other Liabilities and Debts

Bank or Lender	Account Number(s)	Statements Located
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.....
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.....
.....

Logins and Passwords

Password Manager	L
	P
Email	L
	P
Computer	P
	P
Phone	P
	P
Tablet	P
	P
Facebook	L
	P
Twitter	L
	P
Instagram	L
	P
Other Social Media	Service Provider
	L
	P
Cloud Storage	Service Provider
	L
	P
Blog	Service Provider
	L
	P

Other Important Details

Safety Deposit Box

Safe

Memberships

Subscriptions Service and Direct Debits

Cryptocurrency

Lease / Residential Care Contract

Birth Certificate/ Marriage Certificate / Passport

For free legal advice regarding end of life planning, or any questions regarding the terminology used in this form, please contact the Legal Help Line on 1300 366 424.

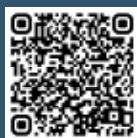
Further Information



Body Donation
Consent Form



Organ Donation
Registration



Advance Care
Directives Brochure



Power of Attorney
Factsheet



Wills
Factsheet

Disclaimer: If completed, this document will contain significant confidential personal information, including passwords, which could be used by another person to access accounts and information. The document should be completed personally and without the assistance of third parties, and be securely stored together with a Will until needed. This document is made available as a public service for information purposes only and should not be relied upon as a substitute for legal advice.