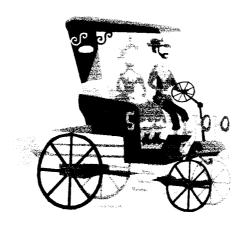
Are You Prepared?



A RESOURCE BOOKLET
Of PERSONAL INFORMATION
For Members of the
Association of Independent Retirees (Inc)

Are You Prepared?

A Resource Booklet of Personal Information for ASSOCIATION OF INDEPENDENT RETIREES (INC)

It is an unfortunate fact of life that this year and indeed, every year some members of our AIR Branch will, through accident or disease, be seriously incapacitated or lose their lives.

In many instances a surviving partner, family member or friend will be in need of assistance to perform the myriad of tasks that must be undertaken immediately as well as the even more numerous duties that must be assumed in the longer term. The person (your *Advocate*) to whom these responsibilities have been delegated may have had little or no experience in many of the areas that must now be addressed: All this at a time when your illness or death causes great distress.

The committee of the Noosa Branch of the Association of Independent Retirees produced this *Are You Prepared* booklet as a resource of personal and public information. We believe that by entering information in this booklet you will minimize your *Advocate's* amount of searching and anguish by leading them to helpful sources of information and useful answers to difficult questions.

The booklet is designed so that it can be completed individually or with a partner. Should a partnership exist it is important that both members enter all the relevant people, locations, organizations, etc.

It is recommended that you complete the various sections first and then transfer details to the **Summary of Current Information** section.

Make the commitment to complete this booklet as soon as possible and remember to review your information annually.

REMEMBER, YOUR BOOKLET CONTAINS <u>VERY SENSITIVE</u> <u>INFORMATION</u>. MAKE SURE THAT YOU FILE YOUR COPY IN A <u>SECURE PLACE</u> AND THAT YOUR ADVOCATE IS INFORMED OF ITS LOCATION.

Acknowledgement

A number of members of the Noosa Branch AIR expressed the need for this type of document and a committee was formed to produce this comprehensive document. Noosa AIR would like to thank Dawn McMurtne, Jim Henwood, Susan Wright, Bob Wright (also of Dicksons Stockbrokers), Kathleen Kelly, Dulcie Beresford, Patricia Rowsell, Joan Fuller and Lorraine Bruin for their contributions.

Association of Independent Retirees (Inc), Noosa Branch, March 2001.

THIS DOCUMENT REISSUED WITH MINOR MODIFICATIONS & ADDITIONS IN APRIL 2008 BY MORETON BAY REGION BRANCH A.I.R.

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Are You Prepared?

A Resource Booklet of Personal Information for AIR Members

INTRODUCTORY CHECK LIST

This booklet is designed to be suitable for one or two persons. If you are single you only need to complete the details for Person 1. If you have a spouse or a partner and you choose to complete the document together, you will need to designate Person 1 and Person 2.

Person 1 Person 2

	T
Name:	Name:
Do you have an Advance Health Directive? Yes □ No □	Do you have an Advance Health Directive? Yes □ No □
Have you appointed an Enduring Power of Attorney? Yes □ No □	Have you appointed an Enduring Power of Attorney? Yes □ No □
Have you appointed a Power of Attorney? Yes □ No □	Have you appointed a Power of Attorney? Yes □ No □
My Advocate is:	My Advocate is:
Name:	Name:
Phone No I am aware in completing this booklet that it is not a legal document but rather a statement of my wishes.	Phone No I am aware in completing this booklet that it is not a legal document but rather a statement of my wishes.
Signed:	Signed:
Date:	Date:

Should you make any changes when completing the document please initial each change!

Personal Details: Person 1

Given names:	
Maiden name:	
Residential Address:	
Postal Address:	
Date of birth:	Place of birth:
Marital Status:	Date of Marriage:
Place of Marriage:	
	:
f spouse deceased – date of death	n:
Fathers Name	
Fathers Address	
Fathers Place of Birth	Date of Birth
Fathers Place of Death	Date of Death _
Mothers Maiden Name	
	Date of Birth _
Mothers Place of Death	Date of Death
Location of certificates - birth, m	arriage, etc:
Name of Personal medical attend	ant:
Phone No	
Cax File No:	ABN:
Passport No:	Expiry Date:
ocation of Passport:	

Personal Details: Person 2

Surname:	
Given names:	
Maiden name:	
Residential Address:	
Postal Address:	
Date of birth:	Place of birth:
Marital Status:	Date of Marriage:
Place of Marriage:	
Name of Spouse (Maiden Name):	
If spouse deceased – date of death:	
Fathers Name	
Fathers Address	
Fathers Place of Birth	Date of Birth
Fathers Place of Death	Date of Death
Mothers Maiden Name	
	Date of Birth
Mothers Place of Death	Date of Death
Location of certificates - birth, marria	ge, etc:
Name of Personal medical attendant:	
Phone No	
Tax File No:	ABN:
Passport No:	Expiry Date:
Location of Passport:	
Pre	nuptial Agreements

CHILDREN - PERSON 1 AND PERSON 2

Note – if child deceased note date of death Name: Date of Birth: Current address: Relationship to existing marriage/ partnership Name: Date of Birth: Current address: Relationship to existing marriage/ partnership Name: Date of Birth: Current address: Relationship to existing marriage/ partnership Name: Date of Birth: Current address: Relationship to existing marriage/ partnership Name: Date of Birth: Current address: Relationship to existing marriage/ partnership Name: Date of Birth: Current address:

OTHER PERSONAL INFORMATION REGARDING FAMILY MATTERS (e.g. adoption)

Relationship to existing marriage/ partnership

24 December 2011 Are You Prepared? Page 4

DETAILS OF ANY BROTHERS AND SISTERS PERSON 1 AND PERSON 2

Note - if sibling deceased note date of death Name: Date of Birth: Current address: Relationship to existing marriage/ partnership Name: Date of Birth: Current address: Relationship to existing marriage/ partnership Name: Date of Birth: Current address: Relationship to existing marriage/ partnership Name: Date of Birth: Current address: Relationship to existing marriage/ partnership Name: Date of Birth: Current address: Relationship to existing marriage/ partnership Name: Date of Birth: Current address: Relationship to existing marriage/ partnership

OTHER PERSONAL INFORMATION REGARDING BROTHERS & SISTERS

BURIAL AND FUNERAL ARRANGEMENTS

Person 1 - Burial and Funeral Wishes		
Preferred type of service: Burial \Box or Cremation \Box		
Type of Service: Religious \square or Celebrant \square or Other \square		
If Religious, state religion:		
Preferred Location of service:		
Preferred priest, celebrant or other:		
Other arrangements (e.g. Flowers, Music):		
Do you have a Prepaid Funeral or a Funeral Plan? Yes □ No □ If YES write details here:		
Are you a willing to be an organ donor? Yes No If YES write details here:		
Is there a special person/confidant/advocate whom you wish to invite to assist your family with funeral arrangements etc.? Yes □ No □		
Name: Phone No:		
My Advanced Health Directive is located with: Name: Phone No.		
My Enduring Power of Attorney/Power of Attorney located with: Name: Phone No:		
ADDITIONAL COMMENTS:		

BURIAL AND FUNERAL ARRANGEMENTS

Person 2 - Burial and Funeral Wishes		
Preferred type of service: Burial \Box or Cremation \Box		
Type of Service: Religious \square or Celebrant \square or Other \square		
If Religious, state religion:		
Preferred Location of service:		
Preferred priest, celebrant or other:		
Other arrangements (e.g. Flowers, Music):		
Do you have a Prepaid Funeral or a Funeral Plan? Yes No If YES write details here:		
Are you a willing to be an organ donor? Yes No If YES write details here:		
Is there a special person/confidant/advocate whom you wish to invite to assist your family with funeral arrangements etc.? Yes □ No □		
Name: Phone No:		
My Advanced Health Directive is located with: Name: Phone No.		
My Enduring Power of Attorney/Power of Attorney located with: Name: Phone No:		
ADDITIONAL COMMENTS:		

MEDICAL INSURANCE COVER

PERSON 1	
Medicare No:	
Do you have Private Health Insurance: Yes \square No \square If YES state:	
Provider's Name: Phone No:	
Membership Number:	
Method of Payment: Cash/Cheque □ Direct Debit □	
Details of any direct debit:	
Do you subscribe to the Queensland Ambulance Yes \square No \square	
If YES state membership number:	
PERSON 2	
Medicare No:	
Do you have Private Health Insurance: Yes \square No \square If YES state:	
Provider's Name: Phone No:	
Membership Number:	
Method of Payment: Cash/Cheque ☐ Direct Debit ☐	
Details of any direct debit:	
Do you subscribe to the Queensland Ambulance Yes \square No \square	

ADDITIONAL COMMENTS:

WILL - PERSO	N 1
My latest will dated is held	
with a copy held at	
My Executor is:	
My Solicitor is:	Phone No:
My Accountant is:	Phone No:
Powers of Attorney	
I have executed an Enduring Power of Attorney in fa	avour of:
Name:And / or	Phone No:
I have executed a Power of Attorney in favour of:	
Name:	Phone No:

FAMILY WILLS AND POWER OF ATTORNEY

WILL - P	ERSON 2
My latest will dated	is held at
with a copy held at	
My Executor is:	
My Solicitor is:	Phone No:
My Accountant is:	Phone No:
Powers of Attorney	
I have executed an Enduring Power of Attor	ney in favour of:
Name:And / or	Phone No:
I have executed a Power of Attorney in favor	ur of:
Name:	Phone No:

PERSONAL AND FAMILY ASSETS

Family Home	
Address:	
In the name of:	
Is the Property Freehold? ☐ Leasehold? ☐	
Title deeds held at:	
Is there a Mortgage? Yes \square No \square	
If Yes, Name of Mortgagor:	
Details:	
Home Insurance Policy No:	
Insurer:	
Contents Insurance Policy No:	Renewal Date:
Insurer:	

Other Real Estate and Investment Property

Property 1
Address:
In the name of:
Is the Property Freehold? □ Leasehold? □
Title deeds held at:
Is there a Mortgage? Yes □ No □
If Yes, Name of Mortgagor:
Details:
Home Insurance Policy No: Renewal Date:
Insurer:
Contents Insurance Policy No: Renewal Date:
Insurer:

Propert	y 2
Address:	
In the name of:	
Is the Property Freehold? ☐ Leasehold?	
Title deeds held at:	
Is there a Mortgage? Yes □	No 🗆
If Yes, Name of Mortgagor:	
Details:	
Home Insurance Policy No:	Renewal Date:
Insurer:	
Contents Insurance Policy No:	
Insurer:	
Propert	y 3
Address:	
In the name of:	
Is the Property Freehold? ☐ Leasehold?	
Title deeds held at:	
Is there a Mortgage? Yes □	No 🗖
If Yes, Name of Mortgagor:	
Details:	
Home Insurance Policy No:	Renewal Date:
Insurer:	
Contents Insurance Policy No:	D 1 D - 4
contents insurance roney 110.	Renewal Date:

FINANCIAL INFORMATION Person 1 - Bank Accounts ACCOUNT 1 **BANK BRANCH BSB ACCOUNT** NAME/S No **DIRECT DEBITS:** TO **FREQUENCY** TO **FREQUENCY ACCOUNT 2 BANK BRANCH BSB ACCOUNT** NAME/S No **DIRECT DEBITS:** TO **FREQUENCY** TO **FREQUENCY ACCOUNT 3 BANK BRANCH BSB ACCOUNT** NAME/S No **DIRECT DEBITS:** TO **FREQUENCY** TO **FREQUENCY** ACCOUNT 4 ACCOUNT **BANK BRANCH BSB** NAME/S No **DIRECT DEBITS:** TO TO **FREQUENCY FREQUENCY CREDIT CARDS** TYPE **BANK** ACCOUNT No **EXPIRY** NAME/S **DATE Safe Deposit Box/Security Envelope:** Location **Access Details Financial Records:** Location **Access Details Other Notes**

FINANCIAL INFORMATION Person 2 - Bank Accounts ACCOUNT 1 **BANK BRANCH BSB ACCOUNT** NAME/S No **DIRECT DEBITS:** TO **FREQUENCY** TO **FREQUENCY ACCOUNT 2 BANK BRANCH BSB** ACCOUNT NAME/S No **DIRECT DEBITS:** TO **FREQUENCY** TO **FREQUENCY ACCOUNT 3 BANK BRANCH BSB ACCOUNT** NAME/S No **DIRECT DEBITS:** TO **FREQUENCY** TO **FREQUENCY** ACCOUNT 4 ACCOUNT **BANK BRANCH BSB** NAME/S No **DIRECT DEBITS:** TO TO **FREQUENCY FREQUENCY CREDIT CARDS** TYPE **BANK** ACCOUNT No **EXPIRY** NAME/S **DATE Safe Deposit Box/Security Envelope:** Location **Access Details Financial Records:** Location **Access Details Other Notes**

COLLECTABLES, JEWELLERY ETC.

etail of items:	
pecial Directives	s re Collectables And Jewellery Etc. Give details of bequests:
Detail of items:	Person 2
Special Directiv	ves re Collectables And Jewellery Etc. Give details of bequests:

SUPERANNUATION, ANNUITIES, LIFE INSURANCE AND PENSIONS

Superannuation:	Yes \square	No 🗆		
Details:				
Annuities: Yes	□ No □			
Details:				
Managed Funds:	Ves 🗖	No. 🗖		
		110		
Details:				
D		T		
Pension: Yes	\square No \square	Type:		
Details:		Card No:		
Superannuation Pe	ensions: Yes 🗆	l No □		
		- 110 -		
Details:				
Life / Disability Ins	surance:	Yes • No		
Policy Type	Insurer	Policy No	Policy Location	Face Value
v v 1			V	
Additional Details	•			

SUPERANNUATION, ANNUITIES, LIFE INSURANCE AND PENSIONS

Superannuation:	Yes \square	No 🗆		
Details:				
Annuities: Yes	□ No □			
Details:				
Managed Funds:	Ves 🗖	No. 🗖		
		110		
Details:				
D		T		
Pension: Yes	\square No \square	Type:		
Details:		Card No:		
Superannuation Pe	ensions: Yes 🗆	l No □		
		- 110 -		
Details:				
Life / Disability Ins	surance:	Yes No		
Policy Type	Insurer	Policy No	Policy Location	Face Value
v v 1			V	
Additional Details	•			

SHARES, ADVISORS AND OTHER INVESTMENTS

Person 1

Broker and/or Fund Manager Name of Firm: Contact Person: Phone No. Chess Sponsor: _____ Chess No. ____ *Notes re Shareholdings & Managed Funds: **Financial Advisor** Name of Firm: Contact Person: _____ Phone No. ____ *Comment: Accountant Name of Firm: Contact Person: _____ Phone No. ____ *Comment: Other Investments, Holdings and Trusts:

SHARES, ADVISORS AND OTHER INVESTMENTS

Person 2

Broker and/or Fund Manager Name of Firm: Contact Person: Phone No. Chess Sponsor: _____ Chess No. ____ *Notes re Shareholdings & Managed Funds: **Financial Advisor** Name of Firm: Contact Person: _____ Phone No. ____ *Comment: Accountant Name of Firm: Contact Person: _____ Phone No. ____ *Comment: Other Investments, Holdings and Trusts:

MOTOR VEHICLES, BOATS, TRAILERS, CARAVANS ETC.

Car □ Boat □ Trailer □ Caravan □ Other:	
Make:	Reg No:
Third Party Insurance:	Renewal date:
Comprehensive Insurance:	Renewal date:
Proof of Ownership location:	
Car □ Boat □ Trailer □ Caravan □ Other:	
Make:	
Third Party Insurance:	_
Comprehensive Insurance:	
Proof of Ownership location:	
Car □ Boat □ Trailer □ Caravan □ Other:	
Make:	_
Third Party Insurance:	
Comprehensive Insurance:	
Proof of Ownership location:	
Car □ Boat □ Trailer □ Caravan □ Other:	
Make:	Reg No:
Third Party Insurance:	Renewal date:
Comprehensive Insurance:	Renewal date:
Proof of Ownership location:	
DRIVERS LICENCE: No	Renewal Date
RACQ MEMBERSHIP: No	Renewal Date
Special instructions re cars, boats, trailers, caravans	, etc:

MOTOR VEHICLES, BOATS, TRAILERS, CARAVANS ETC.

Make:	Renewal date: Renewal date: Renewal date: Reg No: Reg No: Renewal date:
Comprehensive Insurance: Proof of Ownership location: Car □ Boat □ Trailer □ Caravan □ Other: Make: Third Party Insurance: Comprehensive Insurance:	Renewal date: Reg No: Renewal date:
Proof of Ownership location: Car □ Boat □ Trailer □ Caravan □ Other: Make: Third Party Insurance: Comprehensive Insurance:	Reg No:Renewal date:
Car	Reg No:Renewal date:
Make: Third Party Insurance: Comprehensive Insurance:	Reg No:Renewal date:
Third Party Insurance: Comprehensive Insurance:	Renewal date:
Comprehensive Insurance:	
	Renewal date:
Proof of Ownership location:	
Car □ Boat □ Trailer □ Caravan □ Other:	
Make:	Reg No:
Third Party Insurance:	Renewal date:
Comprehensive Insurance:	Renewal date:
Proof of Ownership location:	
Car □ Boat □ Trailer □ Caravan □ Other:	
Make:	Reg No:
Third Party Insurance:	Renewal date:
Comprehensive Insurance:	Renewal date:
Proof of Ownership location:	
DRIVERS LICENCE: No	Renewal Date
RACQ MEMBERSHIP: No	Renewal Date

A Helpful List Of People/Organizations That May Require Notification

The following is a list of people/organizations that may need to be notified in case of serious illness or death. Please note that in the case of death, <u>MANY</u> will require a copy of the **DEATH CERTIFICATE.**

- Solicitor/Public Trustee
- State Electoral Office
- Department of Transport re drivers licence
- Car/boat/trailer/caravan etc registrations
- RACQ
- Pension Funds
- Department of Social Security
- Department of Veterans' Affairs
- Other pensions e.g. Civil Service State or Federal etc.
- Life Insurance company
- Other Insurance companies
- Local council re rates etc
- Electricity / Gas Supplier
- Banks and Credit Institutions
- All direct debits

- Financial Advisor
- Stockbroker / Chess Sponsor
- Accountant
- Australian Taxation Office
- Telephone & Internet Providers
- Private Health Insurer
- Medicare
- Ambulance
- Club Memberships
- Passport Office
- Volunteer Venues
- Body Corporates
- Rental Agencies

STOP PRESS

It has been bought to the attention of our committee, a problem that a couple of our members faced on the deaths of their husbands. In both cases they did not have a credit/debit card in their own names as primary cardholders, but had a secondary card. This meant that they could not access funds, even in joint accounts, from a terminal/store, etc. but had to make direct representation to their banks. This added stress at a time when they least needed it or could handle it. Could you be facing this situation?

In the case of death of a partner, the above list will also serve as a guide for the purpose of change of ownership and billing.

SUMMARY OF CURRENT INFORMATION — Page 1

Details	Person 1	Person 2
Name:		
Medicare No:		
Health Card No:		
Tax File No.		
ABN:		
Drivata Madigal Inggress	100 (ICI : 4	
Provider:	ACE (If Joint complete under Person	1)
Phone No:		
Policy No:		
Renewal date:		
Life Insurance Policy		
Company:		
Phone No:		
Policy No:		
Renewal Date:		
Banking Details		
Joint Accounts		
Bank Name:		
Branch:		
Phone No:		
Account No:		
Individual Accounts		
Bank Name:		
Branch:		
Phone No:		
Account No:		
Credit Cards		
Issuer:		
Phone No:		
1 110110 1 10.		
Supplementary		
Cards? Yes/No:		
Jaido. 100/110.		

Details	Person 1	Person 2		
Safety Deposit Box N	Safety Deposit Box No:			
Financial Advisor:				
Name:				
Phone No:				
Motor Vehicle(s)				
Registration				
Registration No:				
Renewal Date:				
Insurance				
Company:				
Phone No:				
Policy No:				
Renewal Date:				
RACQ Membership				
Phone No:				
Membership No:				
Renewal Date:				

SUMMARY OF CURRENT INFORMATION — Page 2

PERSONAL:		
		ralia:
Date etc.		Passport held - list Country of Issue, Expiry
PREVIOUS MARRIAGE		
1. Date of Marriage:		
Place of Marriage:		
Name of Spouse (Maio	den Name):	
Spouse deceased?	Yes 🗆 No 🗅	Divorced? Yes □ No □
If spouse deceased – d	ate of death:	If divorced – date of divorce:
2. Date of Marriage:		
	Yes 🗆 No 🗅	
If spouse deceased – d	ate of death:	If divorced – date of divorce:
EXECUTORSHIPS HELI	D? Yes 🗆 No 🗀	
		details including location of records:
TAXATION FILES		
List name, address and ph	one number of Tax Ag	ent if applicable & location of files:
OTHER BUSINESS INTI	ERESTS? Yes 🗆 No	0 🗖
List interests in Business,	Partnerships, Deceased	d Estates or Trusts (not listed elsewhere):

PERSONAL (Continued):
DEBTORS OR CREDITORS? Yes □ No □
List any significant amounts owed to you or by you to others (not listed elsewhere):
CLUB &/OR ASSOCIATION MEMBERSHIPS:
ADDITIONAL INFORMATION:

COMPUTER ACCESS DETAILS

Computer access is currently used extensively to deal with everyday transactions in our banking, investment and other activities. Authority to operate these activities includes logon password, PIN numbers, identification code etc. The inclusion of PIN numbers for bank accounts and similar should NOT be listed here! In any case these are invalid in the case of a person's death. However, computer access may be desirable to view statements and other activities in the management of an estate. The following table is provided to enter this information, but very careful and cautious consideration must be given to what is listed and the information included.

ITEM / PURPOSE	WEBSITE	LOGIN	PASSWORD

PERSONAL:

If not borne in Australia Y	ear of Arrival in Austr	ralia:
Date etc.		Passport held - list Country of Issue, Expiry
PREVIOUS MARRIAGE		
1. Date of Marriage:		
Place of Marriage:		
Name of Spouse (Maio	den Name):	
Spouse deceased?	Yes 🗖 No 🗖	Divorced? Yes □ No □
If spouse deceased – d	ate of death:	If divorced – date of divorce:
2. Date of Marriage:		
Place of Marriage:		
Spouse deceased?	Yes 🗆 No 🗅	Divorced? Yes 🗆 No 🗅
If spouse deceased – d	ate of death:	If divorced – date of divorce:
EXECUTORSHIPS HELI	D? Yes □ No □	
If you are an appointed Ex	secutor or Trustee give	details including location of records:
TAXATION FILES		
List name, address and pho	one number of Tax Ag	ent if applicable & location of files:
OTHER BUSINESS INTE	ERESTS? Yes 🗖 No	0 🗖
List interests in Business,	Partnerships, Deceased	d Estates or Trusts (not listed elsewhere):

PERSONAL (Continued):			
DEBTORS OR CREDITORS? Ye	s 🗆 No 🗅		
List any significant amounts owed to you	or by you to others (not	listed elsewhere	e):
CLUB &/OR ASSOCIATION MEMBE	RSHIPS:		
ADDITIONAL INFORMATION:			
COMPUT	ER ACCESS DETA	ILS	
Computer access is currently used external banking, investment and other activition logon password, PIN numbers, identifies bank accounts and similar should NO case of a person's death. However, contained other activities in the management this information, but very careful and and the information included.	es. Authority to operate ication code etc. The inc <u>r</u> be listed here! In any nputer access may be detected to the following th	e these activities clusion of PIN n case these are i esirable to view wing table is pro	s includes numbers for nvalid in the statements ovided to enter
ITEM / PURPOSE	WEBSITE	LOGIN	PASSWORD