

<h2 style="margin: 0;">My Last List</h2> <p style="margin: 0;">Some things to know when I die.</p>	
<b>Full Name</b>	<b>Date</b>

	<i><b>People who can help</b></i>		<i><b>details</b></i>
	Trusted Family Friends/Relatives who can help and will know what to do.		
	Executor/s of my Will		
	Accountant		
	Lawyer		
	Financial Planner		
	Pastor/Minister/Priest		

	<i><b>Copy of Important documents</b></i>	<i><b>Where is original?</b></i>
	<b>Will</b>	
	Executors Name and phone number-	
	Trustee name and phone number-	
	<b>Enduring Power of Attorney (EPA)</b>	
	Attorneys name and phone number-	
	<b>Testamentary Trust</b>	
	Trustee's name and phone number-	
	Passport	
	Drivers Licence	
	Property Deeds if there are any	
	Birth Certificate	
	Funeral Insurance Policy	

	<i><b>Finances and Bank Accounts</b></i>	Account Name and Nickname Type of Account (savings/everyday/term deposit/etc) Bank – BSB – Account Number Passwords Access Codes for phone banking Logins for Netbank
	<i><b>Personal and Joint Accounts</b></i>	

	<b><i>Investment Savings/Funds</i></b>	
	<b><i>Credit Card Account 1</i></b>	
	<b><i>Credit Card Account 2</i></b>	
	<b><i>Trustee Account</i></b>	
	<b><i>Superannuation Funds</i></b>	
	<b><i>Superannuation Accounts (If you have a self - managed Fund)</i></b>	
	<b><i>Investment Accounts (Company or Family Trust Accounts)</i></b>	

	<b><i>Log in's and Passwords</i></b>	
	MyGov Account	
	Medicare Number	
	Tax File Number (TFN)	
	Email Accounts	
	Social Media	
	Facebook	
	Instagram	
	Twitter	
	Others	

	<b><i>Insurance Policies</i></b>	<b><i>List Policy Acc# + Where to locate paperwork</i></b>
	Life (specify all)	
	Accidental Death	
	Total and Permanent Disability Insurance	
	Income Protection	
	Funeral	
	Medical Insurance	
	Home Insurance	
	Investment Property Insurance	
	Vehicle 1 Insurance	
	Vehicle 2 Insurance	

<b><i>The Big Picture</i></b>	
<b>Assets</b>	
<b>Cars</b> – make and Rego, Details of registered owner, any loans and what it would sell for.	
Car 1	
Car 2	
Boat	
<b>Real Estate</b> HOME If rented - Home Address Rental Agent Details Or If Home is Owned: Address Title Deed location Registered Owner/s names If Mortgaged Bank and loan details and amount owning on Mortgage Likely Sale Price. Estimate of Equity	
<b>Investment Property 1</b> Address, Registered Owners % interest If Mortgaged Bank and loan details and amount owning on Mortgage Likely Sale Price. Estimate of Equity	

<b>Investment Property 2</b> Address, Registered Owners % interest If Mortgaged Bank and loan details and amount owning on Mortgage Likely Sale Price. Estimate of Equity	
<b>Investment Property 3</b> Address, Registered Owners % interest If Mortgaged Bank and loan details and amount owning on Mortgage Likely Sale Price. Estimate of Equity	
<b><i>Continue to List all Investment Properties</i></b>	
<b><i>Investment Account Details</i></b>	<i>(could be set out above.)</i>
<b><i>Shares and investment Funds List all separately – Detail Owners names.</i></b>	
<b><i>Memberships to be cancelled.</i></b>	(eg. RACQ, Work or Business Associations, etc.)
<b><i>Subscriptions to be cancelled</i></b>	

<b><i>If you have a Business (List details of all Businesses) Interest in a Business Give as much detail as possible.</i></b>	
<i>Business Name and type of business</i>	
<i>% Interest in Business</i>	
<i>ABN</i>	
<i>Account details</i>	
<i>Accountant Details</i>	
<i>Business Loan Details</i>	
<i>Banking Contact</i>	

## ***My Thoughts***

*(from Scott Pape's 'Fearless Folder' – The Barefoot Investor for Families)*

Who will look after and raise the kids if we both die?

At what age should the kids receive their inheritance?

What happens to our assets if the whole family dies?

Who should make medical decisions on my behalf if I can't?

Who should make financial decision on my behalf if I can't?

Do I want to donate my organs?

Who will take care of my pets?

What are my funeral wishes?

Do I want to be buried or cremated?