

Checklist of Important Documents

Name

Date

Money Goals

DOCUMENTS

LOCATION AND DETAILS

Birth and Marriage Certificates

Location:

Credit Card Details

Bank:

Bank:

Account Name:

Account Name:

Card No.:

Card No.:

Bank Account Details

BSB:

BSB:

Account No.:

Account No.:

Driving License and Passport

Licence No.:

Passport No.:

Expiry:

Expiry:

Insurance Policies

Broker's Details:

Mortgage (s)

Bank:

Account No.:



Checklist of Important Documents

DOCUMENTS	LOCATION AND DETAILS
Superannuation Statements	Adviser Details: Fund (s): Binding Nomination: <div> Yes No </div>
Title Deeds	Bank or Location:
Investment	Broker Name:
Car	Rego: Insurance:
Funeral Plan/Director	Details:
Company Directorships	Details:
Safety Deposit	Location: Key:
Education and Employment	Current Employer: Academic Records:
Tax records (7 years)	Accountant/Tax Adviser: Name: Address:

Checklist of Important Documents

DOCUMENTS	LOCATION AND DETAILS
Spouse	Name: Contact No.:
Lawyer	Firm Name: Address:
Primary Care Physician	Practice: Address:
Dentist	Name: Address:
Accountant	Name:
Financial Adviser	Name:
Health Fund	Name: Account No.:
Travel Insurer	Name: Account No.:
Building / Strata Management	Strata Plan: Managing Agent:

Checklist of Important Documents

DOCUMENTS	LOCATION AND DETAILS
Relatives	Name: Address: Phone: Email
Work Contact	Name: Address: Phone: Email
Friends	Name: Address: Phone: Email
Clubs and Associations	Name: Address: Phone: Email
Will, Power of Attorney and Appointment of Enduring Guardian	Location: Dated:

GET IN TOUCH



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ADDRESS

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