

ESTATE AND FINANCIAL DETAILS

Location of: \_\_\_\_\_

Will: \_\_\_\_\_

Birth Certificate: \_\_\_\_\_

Marriage Certificate: \_\_\_\_\_

Title Deeds to Home: \_\_\_\_\_

Solicitor: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Executor: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Power of Attorney: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Bank Accounts: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Superannuation Fund: \_\_\_\_\_

Other Assets: \_\_\_\_\_

\_\_\_\_\_

This document should be filled in and kept in a place known to at least two members of your family, or friends.

It provides vital information to help your family meet legal requirements and fulfill your wishes after you have gone.

This is not a legal document; it is designed to assist your family, to avoid confusion and problems.

Complete the entries carefully. Make sure also that any wishes you care to express leave sufficient flexibility for your family to accept or modify your guidance in accordance with their needs.

**John & Christine Haddrick**  
**Tate Funeral Services**  
**59-63 Greta Road**  
**Wangaratta 3677**

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**Fax: 5721 8446**

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



**Personal Profile**  
**Record of**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Record the date when you complete the details \_\_\_\_\_

**PERSONAL AND FAMILY DETAILS**

Family Name: \_\_\_\_\_

Given Names: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Date of Birth: \_\_\_\_\_

Place of Birth: \_\_\_\_\_  
(City/Suburb/Town)

State/Country \_\_\_\_\_

Years in Australia \_\_\_\_\_

Occupation  
(During Working life) \_\_\_\_\_

Pension Details \_\_\_\_\_

**MARRIAGE DETAILS**

Married       Widow/er       Divorced

Defac-  to Never married

Place of Marriage \_\_\_\_\_  
(Town/City & Country)

Age when married: \_\_\_\_\_

Name of Wife/Husband  
(Maiden Name if applicable)

\_\_\_\_\_

If additional marriages, please attach list

**CHILDREN** (Full names and date of birth)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**DETAILS OF PARENTS**

Father's Name: \_\_\_\_\_

Occupation: \_\_\_\_\_

Mother's Name: \_\_\_\_\_

Mother's Maiden Name: \_\_\_\_\_

Occupation: \_\_\_\_\_

**NEXT OF KIN**

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Relationship: \_\_\_\_\_

**FAMILY DOCTOR**

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

**PREFERRED FUNERAL SERVICE DETAILS**

Funeral Service held at: \_\_\_\_\_  
\_\_\_\_\_

Clergy/Celebrant: \_\_\_\_\_  
\_\_\_\_\_

Burial/Cremation: \_\_\_\_\_

Cemetery: \_\_\_\_\_

Crematorium: \_\_\_\_\_

Where to place Ashes:  
(If applicable) \_\_\_\_\_

Flowers—Type & Colour: \_\_\_\_\_  
\_\_\_\_\_

Press Notices—Which Papers  
\_\_\_\_\_

\_\_\_\_\_

RSL/Masonic Lodge/Other  
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**OTHER SPECIAL REQUIREMENTS**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_