

Plan Ahead Starter Checklist

Plan
Ahead Co.

A simple starting point to get your most important information organised.
Work through each section and tick off as you go.

KEY DOCUMENTS

- Will
Location & executor noted
- Enduring Power of Attorney
Location & attorney noted
- Passport + birth / marriage certificate
Location known to someone you trust
- Life insurance policy
Provider & policy no. noted
- Superannuation
Fund noted & beneficiary nominated

YOUR PEOPLE

- Next of kin details recorded
- Executor named + informed
- GP details documented
- Solicitor details recorded - if applicable
- Financial advisor / accountant details recorded - if applicable

FINANCIAL BASICS

- Bank accounts
Institution, accounts, access method noted
- Online assets
Access documented, who knows
- Loans & other liabilities
Noted
- Property assets
Noted
- Regular bills + direct debits + utilities
Noted - so nothing is missed

YOUR WISHES

- Medical treatment wishes
Advanced Care Directive completed
- Funeral preferences
Burial, cremation, specific wishes noted
- Personal wishes
Anything you want your family to know
- Organ donation preference
Noted

DIGITAL LIFE

- Email accounts listed
Especially where bills are sent
- Password manager or storage noted
Access documented
- Recurring subscriptions listed
So they can be cancelled
- Phone PIN or access noted
Trusted person informed
- Social media accounts noted
Access documented

WHAT YOU HAVE

- Valuables listed
Jewellery, art, items or significance
- Sentimental items noted
Who you'd want to receive them
- Investment accounts noted
If applicable
- Business interests documented
If applicable
- Other assets noted
If applicable

PRACTICAL DETAILS

- Important documents
Location known
- Safe location – if applicable
Code recorded
- Children / pet arrangements
Documented, if applicable
- Tax File Number / MyGov login
Location known / Access documented
- Medicare No. / Health insurance
Location known / Provider & policy no.
recorded
- Vehicle registration
Details & insurance noted

ONE MORE THING

- Someone trusted knows this
document exists
and knows where to find it
- Document is stored somewhere
accessible
Not locked away where no one can
access
- Date to review this checklist set
Annually, or after major life change

Ready to go further?

Choose your path – work through it yourself with our Self-Guided Personal Affairs Plan, or let us guide you through it with our Concierge service.

Find out more @ planaheadco.com.au