

Estate plan

The Black Box			
Checklist for your personal succession plan			
		Comments	Last Updated
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	Copy of Wills and where they are lodged Instructions not covered in Will Medical Power of Attorney and Enduring Power of Attorney Copy of Passports Copy of Birth Certificates Copy of all Credit Cards Copy of Property Titles Copy of Share Portfolio/HIN Details of Superannuation Funds Details of Life Insurance Policies Copies of Jewellery Valuations Details of General Insurance Policies Details of all Bank Accounts, loans, mortgages, etc. Details of other investments, managed funds, bonds, etc. Details of all Company or Trust Structures-business & personal Statement of Assets & Liabilities Who to contact - both business and personal Contact details of all advisers (ie Accountant, Financial Advisor, Solicitor, trusted people, etc.) Extra passport photos and identifying marks, etc. If travelling, copies of Travel Itineraries and Insurance Details of Doctor and Dentist Small keepsakes Instructions for Funeral and burial requirements A "If you are reading this letter it means....."		