EMERGENCIES & PLANNING

Important documents checklist

Know what exists, where it is kept and who has a copy, before it is needed in a hurry. Record where things are, not account numbers or passwords.

DOCUMENT	HAVE IT	WHERE IT IS KEPT	WHO HAS A COPY
Will	☐		
Enduring power of attorney (financial)	☐		
Medical / guardianship decision-maker appointment	☐		
Advance care directive	☐		
Medicare card	☐		
Pension or concession card	☐		
DVA card	☐		
Private health insurance	☐		
My Aged Care details and support plan	☐		
Aged care service agreement	☐		
Bank and superannuation details	☐		
Property title, lease or retirement village contract	☐		
Insurance policies	☐		
Funeral plan or wishes	☐		
Birth and marriage certificates	☐		
Where the password / login list is kept	☐		

Good to know

Names and rules for powers of attorney, guardianship and advance care directives differ between states and territories.
Advance Care Planning Australia (advancecareplanning.org.au) has free forms and guides for each state.
A solicitor can help with wills and powers of attorney. Review documents after big life changes.

General information only, not medical, legal or financial advice.