



Personal Records Document

All too often we hear of a partner or spouse left without guidance -- without the information necessary to arrange a funeral, to obtain probate or to present a claim to the RBF and when death occurs utter confusion can exist at a time when quietude and order should prevail.

The attached document (Personal Records Document, or PRD), is designed to help the bereaved at such a time. We hope that TASS members will complete this document as a part of their good house-keeping. It is not morbid to prepare realistically for the inevitable -- to the contrary, we owe it to our nearest and dearest to leave our affairs in good order.

Putting your affairs in order

If you are away from home carry a note in your wallet/handbag indicating who should be contacted first in case of emergency. Identifying an emergency contact on your mobile phone with a name prefixed by ICE (In case of emergency) is also a useful approach.

A list of your current medications is also a big help.

Certified copies of documents

Remember to make copies of key documents and certificates and have them certified by a person who has the power to certify the copy. The 'Registry of Births, Deaths and Marriages' in your state has a list of the people who are able to do that. It includes people in certain jobs, like academics, pharmacists, architects, lawyers, teachers, doctors and many others. Note: some documents can only be certified after the death of the superannuant.

Will

You should have a Will; this will help ensure that your estate goes to the right persons and according to your wishes.

Completion of the Personal Record

To help save your family extra trouble and financial worries you should arrange to put information concerning all important matters in a single place at the earliest opportunity. Use a large sealed envelope marked PRIVATE & CONFIDENTIAL – Personal records of <Name>.

Items on the Form are not applicable to all circumstances; and should be considered a guide and reminder list only. There may be additional items you wish to include

It is very important that this document should be protected to ensure it isn't readily available to anyone other than a spouse or partner (or other close and trusted person such as your solicitor). TASS takes no responsibility for misuse of information located in the PRD.

It would be helpful to include copies of relevant documents with this PRD. For example – marriage certificate, RBF Form - Reversionary Life Pension Partner Declaration Form, Enduring Power of Attorney, or Advance Care Directive.

Make sure that you review and update this important summary once every year.

Make it a habit to do it on the day after your birthday.

Information about Power of Attorney, Enduring Power of Attorney, Enduring Guardian, can be found at www.guardianship.tas.gov.au or www.dpipwe.tas.gov.au/land-tasmania/land-titles-office/power-of-attorney-forms

Other Matters and/or Special Requests Attach lists as necessary to the PRD.



PERSONAL RECORDS DOCUMENT

This is the Personal Records Document of

Full Name:		
Address		
IN CASE OF AN EMERGENCY PLEASE NOTIFY IMMEDIATELY:		
Name		Relationship
Address		
Telephone Number(s)		

PERSONAL DATA:

Date of birth	
Place of birth	
Full name of spouse	
Date & Place of Marriage	
Father's name	
Mother's (maiden) name	
Names and addresses of family and others you wish to be notified (attach list)	
List of clubs and organisations of which you are a member	
List any significant public offices / positions you hold	
Religious Denomination	
Local Church / Minister	
Other Information:	

FAMILY DOCUMENTS AND RECORDS

These are some of the main documents and information you need to find and put together:

Document/record	Information / detail	Location (Bank, solicitor, Deposit Box, Filing, Attached, etc)
Marriage Certificate (official document)		
Birth Certificate #		
Divorce papers		
Citizenship papers / certificates		
Birth Certificates - family	Spouse/partner: Children (if under 18):	
Passport	Number: Expiry Date: Country of issue:	
Bank accounts and credit cards	Account numbers: Individual or joint: Signatories:	
Note – Writing down passwords may contravene bank and financial institution rules and regulations or may expose you to a risk of theft or identity fraud. Consider sharing of PIN numbers or passwords with <u>trusted</u> relatives or advisers (such as Power of Attorney, enduring Power of Attorney, Executors, etc), (subject to advice from Financial Institution).		

Document/record	Information / detail	Location (Bank, solicitor, Deposit Box, Filing, Attached, etc)
Investment details (e.g. Shares, funds, trusts)		
Debtors and creditors: <ul style="list-style-type: none"> • Moneys owed to you • Moneys owed by you 	Owed - List names, amounts, and terms: Owing - List names, amounts, and terms:	
Centrelink	Number:	
Medicare	Number:	
Department of Veterans Affairs	Card number:	
Note: Many people have a myGov account that enables access to Government departments such as Centrelink, ATO, Medicare, Veterans Affairs etc. You may nominate someone else to be able to act on your behalf and access your details online.		
Superannuation information	RBF member number: DB Pension type (reversionary or non-reversionary): Other non Defined benefits RBF life pension: Death benefit election? (see note)	

Document/record	Information / detail	Location (Bank, solicitor, Deposit Box, Filing, Attached, etc)
Superannuation information (continued)	<p>Other superannuation income streams or accounts – names, numbers, etc:</p> <p>Binding Death Benefit Nomination Y or N? & where this Nomination is located</p>	
<p>Note: If you are receiving an RBF Defined benefits life pension (reversionary), it will be necessary for your spouse / partner to advise the Retirement Fund Board of Tasmania of the date of your death. RBF will provide the necessary claim form and details of further evidence required for the granting of a surviving partner pension.</p> <ul style="list-style-type: none"> • RBF Enquiry Line on 1800 622 631 • Enquiries can be sent by email to rbf.enquiries@treasury.tas.gov.au <p>Checklists and forms (Some documents can only be provided and certified after the death of the superannuant) are available from RBF at their offices in Hobart or Launceston, or from the RBF website - www.treasury.tas.gov.au/retirement-benefits-fund under the link Reversionary Life Pension Surviving Partner information. RBF Form - Reversionary Life Pension Partner Declaration Form, RBF Fact Sheet - Reversionary Life Pension Surviving Partner Application Checklist and RBF Form - Pensions Surviving Partner Application</p> <p>Also, for some other RBF pensions and other superannuation income streams, you may need to state whether you have elected for the Death Benefit to be paid to your estate or not</p>		
Private health insurance	<p>Fund:</p> <p>Cover:</p> <p>Membership number(s):</p>	
Life insurance information	<p>Company:</p> <p>Member number:</p> <p>Certificates:</p> <p>Money borrowed on Policies:</p>	

Document/record	Information / detail	Location (Bank, solicitor, Deposit Box, Filing, Attached, etc)
Other personal insurance information –	Company: Member number: Certificates	
House title(s); lease documents	Title Deed Numbers:	
	Addresses: Signatories: Other: Mortgage details:	
	Addresses: Signatories: Other: Mortgage details:	
Retirement home/care home	Documentation:	

Document/record	Information / detail	Location (Bank, solicitor, Deposit Box, Filing, Attached, etc)
Real Estate investment, business, farm, or Partnerships:	<p>Title Deed Numbers:</p> <p>Addresses:</p> <p>Mortgage payments / arrangements:</p> <p>Property tax/land tax:</p> <p>Tax documentation:</p> <p>Rental agreement(s):</p> <p>Insurance policies on the properties:</p> <p>Name(s) and address(es) of associate(s) who should be notified in case of serious illness or death</p>	
Car(s), boats, caravans, etc	<p>Make and registration: Insurer(s):</p> <p>Policy number(s):</p> <p>Ownership papers: Loan details:</p>	

Document/record	Information / detail	Location (Bank, solicitor, Deposit Box, Filing, Attached, etc)
Items on Hire Purchase (make a full list)	Items: Agreements: Customer Credit Insurance Policies:	
Receipts and valuations/appraisals for valuables	Artworks: Jewellery: Antiques: Other:	
Tax information	Tax File Number: Final Tax Return date:	
Will	Date of most recent: Executor(s):	
Power of Attorney, Enduring Power of Attorney, Enduring Guardian, etc. Guardianship may become an issue in the event of a double accident	Type, Name, and date:	

Document/record	Information / detail	Location (Bank, solicitor, Deposit Box, Filing, Attached, etc)
Substitute decision makers	<p>Lawyer:</p> <p>Other:</p>	
Funeral information	<p>Insurance plans:</p> <p>Preferred funeral director:</p> <p>Burial or cremation:</p> <p>Cemetery:</p> <p>Cemetery lot location and deed:</p> <p>Service details:</p> <p>Special requirements:</p>	
Key advisers and agents (names and addresses)	<p>Lawyer:</p>	

Document/record	Information / detail	Location (Bank, solicitor, Deposit Box, Filing, Attached, etc)
	Accountant: Financial Adviser: Tax Agent: Stockbroker:	
Usernames and passwords (or password hints) for key online activities	List of key accounts/memberships:	
Note – Writing down passwords may contravene bank and financial institution rules and regulations or may expose you to a risk of theft or identity fraud. Consider lodging a list of passwords/hints with a <u>trusted</u> partner or relative, or an independent trusted entity such as your solicitor		
Safe Deposit Box (or sealed envelope) for safe custody:	The box number: Bank name: Individual or joint names?: Name(s)	Key location Bank address (and branch name)
Military Records	Service records: Discharge Certificate / date: Repatriation Pensioner? Spouse eligible for any Service Benefits?	
Note: Spouse or partner is advised to contact the RSL and/or Legacy and/or Defence Forces Welfare Association, each of whom may be able to offer advice and assistance.		

Medical Issues

Document/record	Information / detail	Location (Bank, solicitor, Deposit Box, Filing, Attached, etc)
Personal medical practitioner:	GP Name and address: Specialist name and address:	
Organ donation - bequeathing your body or body parts (eg, eyes, heart, or kidneys) to a hospital or university	Existing arrangements and dates: My current preferences:	
End-of-life care #	Detail: Doctor/ person that is aware of the requirements: Person to make decisions about end-of-life care: Self or other	
Medical intervention/treatment - that you don't want to have in certain circumstances (eg, a ventilator, use of CPR, tube feeding, etc) #	Details: Doctor/person that is aware of the requirements:	
# Note: these preferences or wishes are non-binding. If there is an Enduring Guardian appointed, and these wishes are known to them, then they can ensure they are followed. Completing an Advance Care Directive is a way of formally documenting your wishes. (available from https://www.health.tas.gov.au/health-topics/palliative-care/about-palliative-care/planning-and-decisions-about-end-life)		