

# Personal Documents of the Deceased

When someone dies various personal documents, papers, policies, certificates, cards etc will need to be located in order to settle the personal affairs of the deceased.

**After locating personal records and documents, you can use the following checklist to consolidate all of the pertinent details:**

ITEM	DESCRIPTION
<b>Will</b> <i>May contain requests for personal funeral arrangements</i>	
<b>Estate Planning Documents</b> <i>May contain details of beneficiaries &amp; intended estate arrangements</i>	
<b>Pre-Paid Funeral Plan</b>	

ITEM	DESCRIPTION
<b>Birth Certificate</b>	
<b>Marriage Certificate</b>	
<b>Place of Birth</b> <i>Town/State/Country</i>	
<b>Citizenship Papers</b>	
<b>Superannuation Papers</b> <i>Fund Name / Account Number</i>	
<b>Insurance Policy - Home &amp; Contents</b> <i>Company Name / Account Number</i>	

ITEM	DESCRIPTION
<p><b>Insurance Policy – Life</b> <i>Company Name / Account Number</i></p>	
<p><b>Insurance Policy – Car</b> <i>Company Name / Account Number</i></p>	
<p><b>Health Care Policy</b> <i>Company Name / Account Number</i></p>	
<p><b>Property Deeds &amp; Mortgage Papers</b></p>	
<p><b>Home Loan Details</b> <i>Company Name / Account Number</i></p>	
<p><b>Investment Loan Details</b> <i>Company Name / Account Number</i></p>	

ITEM	DESCRIPTION
<b>Bank Account Details</b> <i>Bank Name / BSB / Account Number</i>	
<b>Share Certificates</b>	
<b>Vehicle Registration Details</b>	
<b>Taxation Records</b>	
<b>Credit Card Details</b> <i>Organisation Name / Account Number</i>	
<b>Store Card Details</b> <i>Retailer's Name / Account Number</i>	

ITEM	DESCRIPTION
<b>Medicare Card</b> <i>Medicare Card Number</i>	
<b>CentreLink Card</b> <i>Account Number</i>	
<b>Pension / Seniors Card</b> <i>Account Number</i>	