



# Personal Record Book

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Important information is often difficult to find, particularly when it is needed urgently. Therefore, it is important that you keep clear documented records of your personal details and finances. This Personal Record Book will act as an important information source for loved ones, if for some reason you are unable to attend to your own affairs.

We recommend that you keep this document in a safe and accessible place that is known to at least two other people. It is also important that all your estate planning documents are up-to-date and that this information is included in your Personal Record Book.

If you require an additional book to replace your current Personal Record Book, or to refer one to a family member/ friend, they are available at our offices or you can download an electronic copy from our website [www.publictrustee.tas.gov.au](http://www.publictrustee.tas.gov.au).

## ARE YOU AN EXECUTOR?

Being an executor of a Will can be a complex and time consuming task. Many people appoint a friend or relative as a way of acknowledging their respect or admiration for that person. However, being left with the burden of administering a loved one's estate can be a distressing task during a time of grief.

If you have been named the executor of a Will you are under no legal obligation to accept this appointment. Taking on the responsibility may not be the right thing for you and it is unlikely that the person who nominated you would have wanted to put you under stress.

If you don't wish to act as executor you can renounce and transfer the role to an independent professional executor, such as the Public Trustee. Once a person has obtained a grant of probate, it is generally not possible for that person to renounce the appointment.

We are experts in estate administration and with our dedicated team of estate managers, accountants and solicitors we are equipped to deal with any issue that may arise.

## ARE YOU AN ATTORNEY?

Even though you agreed to take on this responsibility many people underestimate the time and the tasks that will be required. You can renounce your role to the Public Trustee.

## My Personal Information

Date / /

Full name

Address

Date of birth / /

Place of birth

Email

Phone

Mobile

## IN THE EVENT OF DEATH, PLEASE NOTIFY THE FOLLOWING PERSON(S) IMMEDIATELY

Name  
Relationship  
Address

Phone

Name  
Relationship  
Address

Phone

## MEMBERSHIP OF CLUBS AND ORGANISATIONS AND SIGNIFICANT PUBLIC OFFICES HELD

### FUNERAL WISHES

Burial      Cremation      Prepaid

Location of burial

Name and address of Funeral Company with whom basic details have been lodged

Phone

Flowers      No Flowers

Donations in lieu of flowers to

Service at:      Church      Parlour      Home      Other

Funeral service to be given by

Type of service required:

## ORGAN DONATION

(Arrangements must be made with appropriate institution prior to death)

Yes      No

Details

Bequeathed to

### WILL

Date of last Will      \_\_\_\_/\_\_\_\_/\_\_\_\_

Name and address(es) of executor(s)

Where is the original copy of my current Will lodged?

### ENDURING POWER OF ATTORNEY

Yes       No

Name of Attorney

Address

Relationship

Phone

### RELIGION

Religion

Place of worship

### NATIONALITY

By birth

By naturalisation

Date of naturalisation      \_\_\_\_/\_\_\_\_/\_\_\_\_

Resident in Australia since

### EMPLOYMENT DETAILS

Occupation

Employer

Address

## PARENTS' DETAILS

Father's name and occupation

Mother's first name and maiden name

## SPOUSE DETAILS

De facto  Yes  No

Date of marriage \_\_\_\_/\_\_\_\_/\_\_\_\_

Place of marriage

Full name

Maiden name

Date of birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Place of birth

Date of death \_\_\_\_/\_\_\_\_/\_\_\_\_

Date of divorce \_\_\_\_/\_\_\_\_/\_\_\_\_

## DETAILS OF PREVIOUS MARRIAGE(S)

Full name

Maiden name

Date of birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Place of birth

Date of death \_\_\_\_/\_\_\_\_/\_\_\_\_

Date of divorce \_\_\_\_/\_\_\_\_/\_\_\_\_

## CHILDREN

1. Full name

Date of birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Place of birth

Date of death \_\_\_\_/\_\_\_\_/\_\_\_\_

2. Full name

Date of birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Place of birth

Date of death \_\_\_\_/\_\_\_\_/\_\_\_\_

3. Full name

Date of birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Place of birth

Date of death \_\_\_\_/\_\_\_\_/\_\_\_\_

4. Full name

Date of birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Place of birth

Date of death \_\_\_\_/\_\_\_\_/\_\_\_\_

5. Full name

Date of birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Place of birth

Date of death \_\_\_\_/\_\_\_\_/\_\_\_\_

## NAME OF FAMILY DOCTOR

Phone

## ACCOUNTANT

Phone

## FINANCIAL ADVISER

Phone

## STOCKBROKER

Phone

## SOLICITOR

Phone

## DIGITAL WISHES

For each digital account you have you may want to specify how you'd like your executor to handle that account. While your wishes may conflict with some companies' terms of service it's still valuable for your executor to know what your wishes are e.g. social media accounts (Facebook LinkedIn Twitter etc.) email accounts etc.

If you have a Facebook profile do you wish to have your user profile  memorialised  deleted

# Other Information

## HOME

Owned solely/jointly/tenants in common with

Mortgaged to

Building & contents insured with

## BANK/CREDIT UNION/BUILDING SOCIETY ACCOUNTS

1. Name and branch of institution

Account name

Account No.

2. Name and branch of institution

Account name

Account No.

3. Name and branch of institution

Account name

Account No.

## SUPERANNUATION

Name and address of fund

Member number

## LIFE INSURANCE

Name and address of company

Policy No.

Life insured

## HEALTH INSURANCE

Name of health insurance company

Private health insurance No

Medicare card No

## PENSION

Centrelink number

Veterans Affairs pension No

Overseas pension No

Military Service No

## WHERE IS IT?

Birth certificate

Marriage certificate

Cheque book

Bank statements

Securities, share certificates, bonds etc

Personal Insurance Policies

Superannuation papers

Cemetery or cremation deed

## THE DEED FOR:

Your home

Other pieces of real estate

## INSURANCE POLICIES ON:

Real estate

Other assets

Military service record and  
discharge certificate

Pensioner Card (Centrelink/DVA)

Any other documents (specify)

Safe custody packet

## DIGITAL ASSET INVENTORY

If you have made a list of digital assets you own (laptop iPad etc) please provide the location of that document. Make sure that this is secure as you may include passwords and other digital asset access information.

Name of any online storage company you may have used



## Notes:



With the Public  
Trustee as executor,  
you will have peace  
of mind knowing  
that we will  
administer an  
estate fairly.

# PublicTrustee

Every moment counts

**CALL US ON 1800 068 784**

**VISIT US AT [www.publictrustee.tas.gov.au](http://www.publictrustee.tas.gov.au)**

**Email:** [tpt@publictrustee.tas.gov.au](mailto:tpt@publictrustee.tas.gov.au)

**Fax:** (03) 6235 5255

GPO Box 1565, Hobart, TAS 7001

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## **YOUR NEAREST PUBLIC TRUSTEE LOCATION:**

HOBART

LAUNCESTON

DEVONPORT

June 2022

PublicTrustee

Every moment counts