

Plan Ahead for Peace of Mind

Use this checklist to ensure that your wishes are known and that your loved ones are supported.

1. Create or Update Your Will

- Appoint an executor
- Describe how you want your assets distributed
- Nominate guardians for children (if applicable)
- Review and update your Will every 3–5 years or after major life changes

2. Enduring Power of Attorney

- Appoint an Attorney, someone you trust to make financial and legal decisions if you are unable
- Seek legal advice if needed

3. Enduring Guardianship

- Appoint a Guardian, someone you trust to make health and personal decisions if you are unable
- Discuss your health and personal care wishes with loved ones and guardian

4. Advance Care Planning

- Complete an Advance Care Directive (ACD)
- Discuss your health care wishes with family and medical professionals

5. Organise Your Financial Information

- Fill out a personal record book
- Give your loved ones a copy of your personal record book or ensure that they know where to find it
- Include logins and passwords in a secure location

6. Communicate Your Wishes

- Talk to your family and loved ones about your plans

7. Review Your Legacy

- Write a personal legacy letter or record a video message
- Think about the values and stories you want to pass on
- Document any charitable gifts or bequests you want to make

TIP: Consider using the Public Trustee or your local solicitor for professional support to ensure your wishes are legally protected.



Download now!

