



HARBOURWEALTH

Last Will and Testament Checklist

Checklist of Important Documents and Information Required

Create a checklist of all the important documents and information you need, keep them in a secure place and inform your loved ones or nominated person/s where to find them. Whilst this is not exhaustive, here is a starting point for a few critical documents:



Last Will and Testament



Identity Documents



Death and Unabridged Birth Certificates



Marriage/Divorce papers



List of important contact names and numbers
that may be required in case of an emergency or death (close family and friend).



Insurance Policy details:
Homeowners, Householders, Car, Medical, Life, Disability, Funeral, Income Protection, Education policies for children and Retirement policies.



Financial planner/Insurance agent/Private Banker/Broker's
contact information and all the policy/account details.



Contact details for your Company's Human Resources Department
to access policies held with the company.



Financial accounts:
Bank, Investment, and Credit Card/Loan accounts information, including institution names, phone numbers, account numbers and passwords or pins. These are important because some accounts have extra benefits cover attached to them that you might not be aware of, including settlement of debt or lump sum pay outs. If families are not prepared, frozen bank accounts can make life very difficult for them.



Title deeds to properties owned.



Any lease agreements you may have with service providers
who you rent from, eg. Cars and property.



Copies of Natis documents for paid up vehicles.



Any lease agreements on property you may rent out.



Copies of the last/most recent tax assessment for each of you etc.