

# TASS

Tasmanian Association of State Superannuants

All too often we hear of a 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. This document, supplied as a service to our members, is designed to help the bereaved at such a time. We hope that all of our 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.

## THE PERSONAL RECORDS DOCUMENT OF

Full Name: .....  
Address: .....  
.....

### IN CASE OF AN EMERGENCY PLEASE NOTIFY IMMEDIATELY:

Name: .....  
Address: .....  
.....  
Telephone Number(s): .....

### 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. A list of your current medications is also a big help. You should have a Will; this makes sure that your estate goes to the right persons and according to your wishes. Leave a sealed envelope detailing your financial affairs.

The following check list will **guide** you.

To help save your family extra trouble and financial worries you should arrange now to put information concerning all important matters in a single place. Use a large envelope sealed envelope with the sticker marked PRIVATE & CONFIDENTIAL.

Obviously this list is not applicable to all circumstances; it is a **guide and reminder list only**.

#### 1. PERSONAL DATA:

- (i) Date of birth: .....
- (ii) Place of birth: .....
- (iii) Full name of spouse: .....  
Date & Place of Marriage: .....
- (iv) Father's name: .....
- (v) Mother's maiden name: .....
- (vi) Names and addresses of family and of those whom you wish to be notified (attach list)
- (vii) List clubs and organizations of which you are a member.  
.....  
.....  
.....  
.....
- (viii) List any significant public offices you may have held.  
.....  
.....  
.....

2. FAMILY RECORDS:

Location of your:

- (a) Marriage Certificate and (b) Birth Certificate: .....
- (c) Birth Certificates of Spouse; Children: .....
- .....

(Proof of your birth and age are required by your executors and by insurance companies, if applicable, a Marriage Certificate may be required by the RBF)

3. RELIGION:

Denomination: .....

Local Church: .....

4. DOCTOR:

Personal medical practitioner: .....

Address: .....

.....

Telephone: .....

5. MEDICAL, HOSPITAL, FUNERAL DIRECTOR, FRIENDLY SOCIETY FUND:

- (i) Name Funeral Director: .....
- Address: .....
- .....
- (ii) Pre-Paid Funeral Details: .....
- (iii) Name Friendly Society: .....
- Address: .....
- .....

6. DOUBLE ACCIDENT:

If guardianship of other(s) becomes necessary as a result of a double accident the following person is nominated as guardian:

Name: .....

Address: .....

.....

Telephone: .....

(It is suggested that a "Power of Attorney" be already given to the person whom you name as the guardian; if so include the name and contact details.)

7. FUNERAL ARRANGEMENTS:

Cremation       Burial

Cemetery: .....

Do you own a cemetery lot? ..... Location: .....

Location of the deed for it: .....

Do you wish to bequeath your body, your eyes, or kidneys to a university or hospital?

Please specify .....

8. MONEY:

- (a) Bank(s)/Credit Union (which branch) Accounts? .....
- .....
- Account Number: .....
- (b) Bank (which Branch): .....
- Account Number: .....

Should immediate funds be required, apply to:

- Name: .....
- Address: .....
- .....
- Telephone: .....

9. STOCKS, BONDS, TRUST FUNDS, BUILDING SOCIETIES ETC:

- (i) List any securities owned and state where they are kept. Attach a list.
- (ii) Name, address and telephone number of your Stock Broker(s):
- .....
- .....
- .....

10. LIFE INSURANCE:

Make a complete list:

- Company Policy No: ..... Money borrowed on Policy .....
- Payments .....
- Where the Policies are kept .....

11. OTHER INSURANCE POLICIES:

(House, Contents, Car, etc.): Location of the policies:

- (i) Company Policy No. .... Description.....
- (ii) Company Policy No. .... Description.....

12. WAR RECORDS:

- (a) Where is your Service Record? .....
- (b) Where is your Discharge Certificate? .....
- (c) Are you a Repatriation Pensioner? .....
- (d) Is your spouse eligible for any Service Benefits? .....
- Suggest that your spouse be advised to contact: .....
- (i) R.S.L. and/or (ii) Legacy and/or Defence Forces Welfare Association, as may be appropriate, each of whom will offer expert advice and assistance.

13. SAFE DEPOSIT BOX or (SEALED ENVELOPE FOR) SAFE CUSTODY:

- (a) The number of your box .....
- (b) Where is the key? .....
- (c) Name and address of bank (name the branch): .....
- (d) Is the box/envelope in your own or joint names? .....
- Specify name(s): .....

14. SUPERANNUATION:

As you are receiving superannuation, if you are a married person it will be necessary for your spouse to advise the Retirement Fund Board of Tasmania of the date of your death, and the Board will then forward the necessary claim form and details of further evidence required for the granting of a widows/widower's pension. Address correspondence to:

The Secretary, Retirement Benefits Fund Board of Tasmania, and G.P.O. Box 446E,  
Hobart 7001. Ph 0362333672 or 1800 622 631

15. PERSONAL TAXES and RATES:

- (a) Your taxation file number: .....
- (b) Where the duplicate returns are kept: .....
- (c) Where the receipts and records for your rates are kept: .....
- .....
- (d) Taxes .....
- (e) Have taxes and rates for the current year been paid? .....

16. CAR, CARAVAN, POWER BOAT or OTHER ASSETS:

- (a) Where is the bill of sale? .....
- (b) Where is the Registration Certificate? .....
- (c) Name of insurance company: .....
- (d) Insurance Policy Number(s): .....
- (e) Are there any payments yet to be made? .....

17. REAL ESTATE, BUSINESS, FARM, or PARTNERSHIPS:

- (a) Where the deed to each piece of Real Estate is kept.....
- (b) List any mortgages or Loans (Quote the Title Deed Numbers): .....
- .....
- (c) How have mortgage payments been made?
  - a. Are all property taxes paid? .....
  - b. Where are the tax receipts? .....
- (d) List any rental agreement(s) you have: .....
- (e) What revenues may be expected from your real estate or business: .....
- (f) List any insurance policies on your property and where these policies may be found:  
.....  
.....  
.....
- (g) Name(s) and address(es) of associate(s) who should be notified in case of serious illness or death: .....
- .....

18. HIRE PURCHASE:

- (a) Items on Hire Purchase (make a full list) .....
- .....
- .....
- (b) Do your Hire Purchase Agreements carry Customer Credit Insurance Policies' (please specify).....
- .....

19. DEBTORS AND CREDITORS:

Any moneys owing to you? .....  
.....  
List names, amounts, and terms: .....  
.....  
Do you owe any moneys? ..... (Keep receipts for six years)  
List names, amounts, and terms: .....  
.....  
.....

20. YOUR WILL:

What is the date of your Will? .....  
Location of original and any copies? .....  
Name and address of your solicitors: .....  
Name(s) and address(s) of your executor(s): .....

It is suggested that a "Power of Attorney" be given to the person whom you name as the executor of your Will.

21. SOCIAL SECURITY and/or PENSION(S):

Pension Number: .....  
Contact Address: .....  
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When you have completed this important summary, put it into a large envelope, seal it with a sticker labelled **PRIVATE & CONFIDENTIAL**.

Leave the envelope in some secure place (e.g. your bank) known to your next-of-kin and solicitor OR with your solicitor.

**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. One copy of this important document is supplied to all TASS members free of charge. We do have a few spare copies available should you lose this one supplied.

Please write to TASS. PO Box 66, New Town, Tas, 7008.

Copies can also be easily downloaded from our website <http://www.tass.org.au>

22. OTHER MATTERS and/or SPECIAL REQUESTS:

Please list.