

# Where my information & possessions are kept.

## Personal details

Name: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Address: \_\_\_\_\_

PPSN: \_\_\_\_\_

Medical card no.: \_\_\_\_\_

Next of kin / On my death, please contact: \_\_\_\_\_

\_\_\_\_\_

## My will

My will is located: \_\_\_\_\_

\_\_\_\_\_

Date of last will: \_\_\_\_\_

The executors of my will are:

1. Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact no.: \_\_\_\_\_

2. Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact no.: \_\_\_\_\_

My solicitor is:

Name: \_\_\_\_\_

Name of firm: \_\_\_\_\_

Contact no.: \_\_\_\_\_

## My documents

My birth and / or marriage cert are located in: \_\_\_\_\_

\_\_\_\_\_

My grave and funeral arrangements are located in: \_\_\_\_\_

\_\_\_\_\_

My property deeds or tenancy agreement is located in: \_\_\_\_\_

\_\_\_\_\_

I have lodged an envelope for safe keeping with: \_\_\_\_\_

\_\_\_\_\_

## My financials & insurances

My life insurance policy documents are located in: \_\_\_\_\_

My broker's contact details are:

Name: \_\_\_\_\_

Name of firm: \_\_\_\_\_

Contact no.: \_\_\_\_\_

My Social Welfare pension claim no. is: \_\_\_\_\_

My private pension policies are located in: \_\_\_\_\_

My deposit account books are located in: \_\_\_\_\_

I hold the following bank accounts:

1. Bank name & branch: \_\_\_\_\_

Name on account: \_\_\_\_\_

Account no.: \_\_\_\_\_

2. Bank name & branch: \_\_\_\_\_

Name on account: \_\_\_\_\_

Account no.: \_\_\_\_\_

3. Bank name & branch: \_\_\_\_\_  
Name on account: \_\_\_\_\_  
Account no.: \_\_\_\_\_
4. Bank name & branch: \_\_\_\_\_  
Name on account: \_\_\_\_\_  
Account no.: \_\_\_\_\_
5. Bank name & branch: \_\_\_\_\_  
Name on account: \_\_\_\_\_  
Account no.: \_\_\_\_\_

Details of any other accounts that I hold are as follows: (E.g. Credit Union / Post Office / Building Society)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Details of any other investments that I hold are as follows: (E.g. Shares / Bonds / Personal loans to others repayable on my death)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Details of any other possessions of value to me:

\_\_\_\_\_  
\_\_\_\_\_

Passwords and login details for any of my online accounts are as follows:

\_\_\_\_\_  
\_\_\_\_\_

Additional notes of relevance:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signed: \_\_\_\_\_

Dated: \_\_\_\_\_