



My Finances Handbook

Secure your future





We have designed this little book to help you keep track of all the details of your personal and financial affairs, so you can have it all in one handy, pocket-sized booklet.

It is intended to give loved ones key information, not in any great detail, but tips and clues on where to find things. In the unfortunate event of a family death, we want to make things easy for our loved ones to deal with matters, rather than add to their stress.

Technology is marching on and these days, it is not only financial information that is needed but access to social media accounts. Under privacy laws, sites such as Facebook and LinkedIn will not allow family members access to a loved one's account. If you'd like your family to take control of your online footprint after your death, you need to make it possible for them to do so.

Should you need any advice related to this handbook, please don't hesitate to contact us.

Yours sincerely,

Sook Smith

Important Contact Details

Accountant:

Financial Advisor:

Solicitor:

Bank Manager:

Other Trusted Advisors:

Trusts

Details of any Trust you may be a member of:

Powers of Attorney - where stored or held

Legal Matters

Details of any Court Case you may be involved with or could be pending:

Memberships

Subscriptions

Travel Reward Program Membership

Passwords and Safe Combinations - where stored or held

Key Website Login Details

Social Media Sites

Professional Organisations

Will – where stored or held

Insurance Policies (Life, Trauma, Home, Car)

Policy Name:

Policy Number: Contact Number:

Policy Name:

Policy Number: Contact Number:

Policy Name:

Policy Number: Contact Number:

Policy Name:

Policy Number: Contact Number:

Policy Name:

Policy Number: Contact Number:

Superannuation

Fund:

Death Benefit Notices:

Bank Accounts

Bank:

Account Name:

BSB: Account Number:

Bank:

Account Name:

BSB: Account Number:

Bank:

Account Name:

BSB: Account Number:

Credit Cards (are their secondary holders?)

Mortgage Details

Car Loans

Other Loans

enabling aspirations



Start



Scale



Secure

contact us

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Brookvale • Lindfield • Melbourne

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