

Estate Planning

Updated 15 July

The purpose of this form is to record your internet usernames and passwords for all your accounts.

The information on this form will make it easier for your family members or executor of your estate in case you're no longer able to manage your affairs. Some of the information does not involve internet access but would still be handy to have when closing accounts. This form is a guide only and should only be used at the user's discretion.

Store this form in a safe place where it can be easily accessed by those who need it. Inform the necessary people of where this form is kept. It can even be with your estate lawyer or executor. Ensure all your legal documents have your full name as printed on your Birth Certificate and Passport (not just initials).

Disclaimer:

Please note that the information provided in this form is for general informational purposes only and should not be considered legal advice. While I strive to provide accurate and up-to-date information, I am not a licensed attorney. Legal matters can be complex and vary depending on jurisdiction, context, and specific circumstances. Therefore, it is always advisable to consult with a qualified legal professional or seek appropriate legal counsel for personalized advice tailored to your specific situation. Reliance on any information provided in this form is solely at your own risk, and I disclaim any liability for any actions taken based on the information provided.

Keep this form up-to-date.

DATE _____

Provisions have been made for two people to enter data on this form.

(1) Full Name:	
Date of Birth:	
(2) Full Name	
Date of Birth:	
Address:	
Do you or your partner have any of these forms?	
<u>Enduring Power Of Attorney</u>	(1) (2)
<u>Advance Health Directive</u>	(1) (2)
<u>Will</u>	(1) (2)
Where are these documents kept?	
Forms are available from a Queensland Government web site.	Power of Attorney and Advance Health directive forms
Fire Proof Safe combination/location	
Other Hiding Places around your home.	
Who to Contact in case of Emergency:	

Your Bank-1

Bank Name	
BSB Number	
Account Number	
Name on Account	
Joint Holder Name	
Customer ID or User Name for Internet	
Password	
Two Factor Authentication Method used:	
Additional Security Measures for Login. Security Questions Code Words	
Automatic Payments:	
Automatic Deposits:	
Other information	

Your Bank-2

Bank Name	
BSB Number	
Account Number	
Name on Account	
Joint Holder Name	
Customer ID or User Name for Internet	
Password	
Two Factor Authentication Method used:	
Additional Security Measures for Login. Security Questions Code Words	
Automatic Payments:	
Automatic Deposits:	
Other information	

Credit/Debit Cards

Card type and bank	
Card Number	
Expiry Date	
Name on Card	
Security number on back of card	
PIN	
Card type and bank	
Card Number	
Expiry Date	
Name on Card	
Security number on back of card	
PIN	
Card type and bank	
Card Number	
Expiry Date	
Name on Card	
Security number on back of card	
PIN	
Card type and bank	
Card Number	
Expiry Date	
Name on Card	
Security number on back of card	
PIN	
Card type and bank	
Card Number	
Expiry Date	
Name on Card	
Security number on back of card	
PIN	

My Gov OZ & Government Issued Cards/numbers/papers

User Name or Email for <u>MYGovOZ</u> login:	1. 2.
Password	1. 2.
Two Factor Authentication Method used:	
Security Questions	
<u>Tax File Number</u>	1. 2.
<u>Medicare card number</u> Number next to name	1. 2.
Commonwealth Seniors Health Card Number or Pensioner Card (CRN)	1. 2.
Dept. of Veterans Affairs (DVA)	1. 2.
Seniors Card Number	1. 2.
Go Card Number	1. 2.

Name on <u>Drivers Licence:</u>	1. 2.
State	1. 2.
Licence No.	1. 2.
Card No. (on back)	1. 2.
Expires on:	1. 2.
<u>Passport:</u> Full Name as it appears on passport.	1. 2.
Number:	1. 2.
Expires on:	1. 2.
Additional information	

Shares - Investor Centre Login –Retirement Plan

Share Name:	
HIN/SRN	
Full Name as it appears on Share	
Address as it appears on Share	
Internet address for log in (example Computershare or Link Market Services)	
User ID	
Password	
Two Factor Authentication	
Dividends paid to:	
-- Bank Name / BSB	
-- Account No.	
Additional Information	
<u>Retirement plan accounts</u>	
Superannuation:	
Name of Company	

Private Health Insurance

Name of Company	
Contact telephone number	
Policy Number	
Renewal Date	
Internet Log In User Name	
Password	
Two Factor Authentication	
Additional Information	

Car Insurance

Make/Model of car 1	
Rego Number	
Make/Model of car 2	
Rego Number	
Name of Insurance Company	
Contact telephone number	
Policy Number	
Renewal Date	
Internet Log In User Name	
Password	
Two Factor Authentication	
Additional Information	

Home/Contents Insurance

Name of Company	
Contact telephone number	
Policy Number	
Renewal Date	
Internet Log In User Name	
Password	
Two Factor Authentication	
Additional Information	

Other Reoccurring Bills:

Payee	Date Due	How paid
Mortgage Payments		
Council Rates		
Rent / Body Corporate		
Water		
Power		
Gas		
Internet Service Provider		
Mobil Telephone		

Do you have internet accounts with the above listed Payees? If so, provide User Names and Passwords.

Payee	Internet Address	User Name	Password
Internet Service Provider			
Mobile Telephone			

Email

Email Address	
Password	
Two Factor Authentication	
Additional Security Measures	
Email Address	
Password	
Two Factor Authentication	
Additional Security Measures	
Email Address	
Password	
Two Factor Authentication	
Additional Security Measures	

Email Address	
Password	
Two Factor Authentication	
Additional Security Measures	
Email Address	
Password	
Two Factor Authentication	
Additional Security Measures	
Email Address	
Password	
Two Factor Authentication	
Additional Security Measures	

Computers/Telephones/Tablets/Hard Drives

<u>Windows OS</u>	
User Name:	
Password:	
PIN:	
Password reset code (if provided)	
Bit Locker Recovery Key: Pro versions only	
Security Questions:	
<u>Apple OS</u>	
Apple ID:	
User name:	
Password:	
Security Questions:	
Telephone PIN	
Tablet PIN	
Encrypted Hard Drive Password: Location:	
Encrypted Files:	
File Name:	
Password:	
Location:	
Password Manager	

Other Accounts

Website Address	
Account Name	
User Name	
Password	
Additional Security Measures	
Notes:	
Website Address	
Account Name	
User Name	
Password	
Additional Security Measures	
Notes	
Website Address	
Account Name	
User Name	
Password	
Additional Security Measures	
Notes	
Website Address	
Account Name	
User Name	
Password	
Additional Security Measures	
Notes	
Website Address	
Account Name	
User Name	
Password	
Additional Security Measures	

Website Address	
Account Name	
User Name	
Password	
Additional Security Measures	
Additional Information	

Additional Information: