

FINANCIAL DOCUMENT ORGANISER

Having your financial information organised in one place makes things easier for you — and for the people who may need to help you in an emergency. This page is not for passwords.

It is a guide to help you record where important information is kept. Store this in a safe place.

Important Legal Documents

Will

Location of original Will: _____

Who holds a copy (if anyone): _____

Executor name: _____

Contact details: _____

Advance Care Directive / Medical Documents (if applicable)

Location: _____

Enduring Power of Attorney (if applicable)

Location: _____

Attorney name: _____

Superannuation

Fund name(s): _____

Member number(s): _____

Online login location (e.g. password manager name only): _____

Binding death nomination in place?

Yes

No

Unsure

Insurance Policies

List each policy and where it is stored.

Type (Life / TPD / Income Protection / Health / Car / Home): _____

Policy provider: _____

Policy number: _____

Location of documents: _____

Repeat for additional policies if needed.

Bank Accounts

Bank name(s): _____

Accounts held (e.g. everyday, savings, joint): _____

Where statements are accessed: _____

Digital & Password Access

Password manager used (if any): _____

Location of master password instructions (not the password itself):

Important digital accounts to consider:

- Email
- Cloud storage
- Social media
- Investment platforms

Important Contacts

Financial adviser (if applicable): _____

Accountant: _____

Solicitor: _____

Super fund contact: _____

Insurance provider contact: _____

Employer HR contact (if relevant): _____