

MyFile

All your records
in one place

The purpose of this file is to provide a comprehensive and up to date record of your personal information. It will provide a valuable reference:



In the event that you are away or incapacitated

Once you have recorded your personal information it will be available to help your loved ones to step in and manage your affairs without the time consuming and difficult task of locating the necessary information.



To assist your executor to administer your Will

This file will also assist the executor of your estate and minimise the time and expense involved in administering your Will.



For couples about their legal and financial affairs

This file may also provide a useful reference point in understanding and keeping track of information.

Completing your file

There is room in this file to record a range of information. You may choose not to complete some sections if you have recorded this information elsewhere, or simply because you do not feel it is necessary to record it. Use the file in a way that is most appropriate and suitable for your needs.

Storing your file

Store this file in a safe place, but be sure to let your loved ones know where it is kept. There is room in the file to record the location of many important documents (such as birth and marriage certificates). However, it is not necessary to store those documents with this file. In fact, for security purposes, you may choose to keep those documents in a separate, secure filing cabinet or safe deposit box. DO NOT include passwords or PINs in this file.

Keeping your file up to date

You should review your file regularly (for example, once every year) to ensure that it is up to date. You may wish to use the table below to record when and who updates the file.

Updated by:

Date:



Important: MyFile is a personal record-keeping tool for your use only. Do not return it to CSC. It does not provide legal, financial, tax or estate planning advice. This document does not authorise anyone to act on your behalf. If completed, it may contain sensitive personal and financial information and should be stored securely. CSC is not responsible for any loss, unauthorised access or compromise of a completed MyFile.



Part A. Personal details



Your details

Name

Date of birth

Address

Phone number

Medicare number

Driver's licence number

Email address

Passport number

Your Partner's details

Name

Date of birth

Address

Phone number

Medicare number

Driver's licence number

Email address

Passport number



Note: As your Tax file number is a highly sensitive personal identifier, it is recommended you store it separately in another secure document.



Part B. Family & Friends



Children

Name

Phone number

Other relatives and close friends

Name

Phone number



Part C. Legal affairs



Will

Date signed

Stored

Copy held by

Executor(s)

Executor 1 (name)

Phone number

Address

Executor 2 (name)

Phone number

Address

Guardianship (if applicable)

Date signed

Stored

Copy held by

Power of Attorney (if applicable)

Date signed

Stored

Copy held by

Advanced Health Care Directive (if applicable)

Date signed

Stored

Copy held by

Other important documents

	Where it's kept	Copy held by
Birth certificate		
Marriage certificate		
Divorce/Decree Nisi		
Passport		
Property title(s)		
Insurance policies		
Superannuation statements		
Bank account statements		
Other financial statements		
Share certificates		
Most recent tax return		
Motor vehicle registration(s)		
Loan/Mortgage contract(s)		
Rental/Lease agreement		
Safe deposit box details		

Notes and special instructions



Part D. Financial affairs: Assets



Property

Address of the property

Name of any joint owner(s)

Cash in bank accounts

Bank name 1

BSB number

Account number

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Names of any joint owner(s)

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Bank name 2

BSB number

Account number

--

--

--

Names of any joint owner(s)

--

Bank name 3

BSB number

Account number

--

--

--

Names of any joint owner(s)

--

Bank name 4

BSB number

Account number

--

--

--

Names of any joint owner(s)

--

Superannuation

Fund name

Account number

Shares

Company name	Number of shares	Names of any joint owner(s)

Other Investments

Financial institution name	Account or reference number	Names of any joint owner(s)

Business Interests

Business	Details	Names of any joint owner(s)

Other significant assets

Item <i>(For example, expensive motor vehicles, artwork, jewellery etc)</i>	Names of any joint owner(s)



Part E. Financial affairs: Liabilities



Liabilities

Creditor

Type of Liability (Mortgage, Personal Loan, Credit Card etc)

Name(s) of anyone jointly liable



Part F. Financial affairs: Regular bills



Regular bills

	Provider	Account number	Frequency (Weekly, monthly, quarterly etc)	Payment method (C/card, direct deposit, automatic deduction)
Council rates				
Body corporate				
Electricity				
Water				
Insurance:				
Home & Contents				
Private Health				
Vehicles				
Phone:				
Landline				

Phone:
Mobile

Cable & Internet

Subscriptions/
Memberships

Other regular bills

Payment to	For	Frequency (Weekly, monthly, quarterly etc)	Payment method (C/card, direct deposit, automatic deduction)



Part G. Employment details



Your employment details

Employer

Role /Job title

Address

Phone number

Commencement date

Direct manager

Your partner's employment details

Employer

Role /Job title

Address

Phone number

Commencement date

Direct manager



Part H. Insurances



Insurances

Insurance	Insurer	Policy number
Home & Contents		
Motor Vehicle		
Private Health		
Life		
Income Protection		
Total & Permanent Disability		

Other insurances

Type	Insurer	Policy number



Part I. Professional service providers & Trades



Accountant

Name

Address

Phone number

Financial Planner/Adviser

Name

Address

Phone number

Lawyer

Name

Address

Phone number

Doctor

Name

Address

Phone number

Aged Care provider

Name

Address

Phone number

Dentist

Name

Address

Phone number

Medical specialist

Name

Address

Phone number

Optometrist

Name

Address

Phone number

Podiatrist

Name

Address

Phone number

Mechanic

Name

Address

Phone number

Electrician

Name

Address

Phone number

Plumber

Name

Address

Phone number

Other

Name

Address

Phone number

Other

Name

Address

Phone number

Other

Name

Address

Phone number

Other

Name

Address

Phone number

Notes



Part J. In the event of death



People to be informed include:

Name

Address

Phone Number

Name

Address

Phone Number

Name

Address

Phone Number

Name

Address

Phone Number

Name

Address

Phone Number

Name

Address

Phone Number

Notes and special instructions