PERSONAL AND FAMILY **PROFILE BOOKLET**

funeralplan MANAGEMENT

"Investing in a funeral plan can help relieve your family of the financial and emotional burden of making funeral arrangements"

INTRODUCTION

As a service to you and your family, Funeral Plan Management, in conjunction with your funeral director, have prepared the Personal & Family Profile booklet. This booklet, when complete, will contain valuable legal and personal information, which can be used in the future as a basis for arranging a funeral. Although this is not a legally binding document, the information will assist your family to meet legal requirements and fulfil your wishes.

Please take care when completing the entries, making sure that all instructions are clear and specific. Should you have any difficulties in completing the booklet, either your funeral director or our staff will be available to assist you.

When complete, this booklet should be stored in a safe place, along with your Will. We recommend that you advise at least two members of your family where you keep these documents.

Note: Please note the date at which you commenced your entries and review the contents on a regular basis, or at least every 4 years.

Date / /

Participating funeral director stamp

PERSONAL AND FAMILY DETAILS

The following information will assist in meeting legal requirements necessary for the registering of a death

Are you of Aboriginal or Torres Strait Island origin? ☐ Yes ☐ No

Family name

Given name(s)

Date of birth / / ☐ Male ☐ Female

Place of birth

Date arrived in Australia (if applicable)

Address

Occupation during working life

Pension details

Pension type

Pension number

Parent's details

Father's full name

Father's occupation
(during working life)

Mother's full name

Mother's
maiden name

Mother's occupation
(during working life)

Number of years
(lived in each state)

☐ ACT ☐ NSW ☐ NT ☐ QLD

☐ SA ☐ TAS ☐ VIC ☐ WA

☐ CI (Christmas Islands) ☐ CKI (Cocos Keeling Islands)

Current marital status

Please tick (✓) appropriate box

☐ Married ☐ Widow(er) ☐ Divorced ☐ Never married ☐ Defacto

First marriage

Age of marriage

Place of marriage

Date of marriage

Name of spouse
(Prior to this marriage,
full name)

Second marriage (if applicable)

Age of marriage

Place of marriage

Date of marriage

Name of spouse
(Prior to this marriage, full name)

Give first names, current surnames, gender and date of birth of all children including any legally adopted, stillborn or deceased

Number of children

1. Given names

   Surname

   Date of Birth / / Male Female

2. Given names

   Surname

   Date of Birth / / Male Female

3. Given names

   Surname

   Date of Birth / / Male Female

4. Given names

   Surname

   Date of Birth / / Male Female

If more than four children, please attach details.

DETAILS REGARDING FUNERAL ARRANGEMENTS

Pre-arrangement details

Have you pre-arranged your funeral? ☐ Yes ☐ No

Has money been paid toward the pre-arranged funeral? ☐ Yes ☐ No

If "Yes", complete the following details.

Funeral contract number

Document located at

Amount paid $ Date paid / /

Preferred funeral service arrangements

Type of funeral ☐ Burial ☐ Cremation

Funeral service preferences (you may tick more than one)

☐ Church ☐ Funeral chapel ☐ Crematorium/Graveside

☐ RSL involvement ☐ Single service ☐ Lodge involvement

Other (please specify)

Existing grave or cremation deeds

Cemetery or Crematorium	
Grave or Cremation deed no.	
Name of deed holder	

People to be notified

Next of Kin	
Address	
Phone	
Solicitor	
Address	
Phone	
Executor	
Address	
Phone	
Person/Clubs/ Associations	

ESTATE INFORMATION

Financial details

Name and branch of Institution or Company	Account/Reference number
Bank or Building Society accounts	
1.	
2.	
Investment accounts	
1.	
2.	
Mortgage	
1.	
2.	
Hire purchase agreements	
1.	
2.	
Bank card or credit cards	
1.	
2.	
Insurance policies (car, house, etc)	
1.	
2.	

Financial details

Name and branch of Institution or Company	Account/Reference number
Superannuation	
1.	
2.	
Life Assurance policies	
1.	
2.	
Health - medical benefits	
1.	
2.	
Medicare number(s)	
1.	
2.	
Drivers licence number(s)	
1.	
2.	
Other assets (eg car, property, shares etc)	
1.	
2.	

LOCATION OF DOCUMENTS

Please indicate where the following documents are kept

Will	
Certificate of birth	
Certificate of marriage	
Childrens' birth certificates	
Pre-arranged funeral documents	
Cemetery or Cremation deeds	

Financial documents
(eg bank books, share certificates, certificate of title, insurance policy)

Notes

A LITTLE FORETHOUGHT, A GREAT DEAL OF BENEFIT

By planning ahead you can ensure peace of mind for you and your family.

Pre-arranging and pre-paying your funeral means that you are able to select the service you would like and relieve your family of the emotional and financial burden of making these arrangements themselves.

Also, by pre-paying you can ensure that the cost of the funeral service is fixed forever at today's prices.

If you would like more information regarding pre-paid funeral planning, call Funeral Plan Management on Freecall **1800 804 731** or visit **fpmanagement.com.au.**

funeralplan MANAGEMENT

At Funeral Plan Management, our simple policies are designed to help you make easy decisions. We provide professional administration and investment information to Australians on all aspects of advance funeral planning. Don't hesitate to contact us for more information.

POST: Reply Paid 89, Adelaide SA 5001

TELEPHONE: 1800 804 731 (freecall)

EMAIL: funeral.plans@lifeplan.com.au

WEBSITE: fpmanagement.com.au

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