



# My personal information book

**‘Do all the good you can, by all the means you can, in all the ways you can, in all the places you can, at all the times you can, to all the people you can, as long as ever you can.’**

# Introduction

**Your personal information book is designed to:**

- provide vital information for your family and friends in the event of a personal emergency or your incapacity
- help you identify and establish the value of, and different aspects to your estate and the people or organisations you would like to include in your Will
- assist your executor in the effective administration of your estate.

We urge you to complete this valuable record as soon as possible, and to keep it with your Will. We also ask you to consider making a gift to Wesley Mission in your Will, which will bring help and healing to people in desperate need.

# My personal information

## My personal details

Full name:

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Date of birth:

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Place of birth:

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Home address:

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Home phone:

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Business address:

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Business phone:

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Passport number:

---

Tax file number:

---

Medicare number:

---

Pensioner card number:

---

Drivers licence number:

---

Blood group:

---

Church affiliation:

---

This personal record was prepared/last updated on:

---

## My family details

### Spouse or partner's name (including maiden name):

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Place of marriage:

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Date of marriage:

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Father's full name:

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Mother's full name (and maiden name):

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### Children's full names and birth dates (in order of birth):

1. Name:

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Address:

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Telephone:

---

Date of birth:

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2. Name:

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Address:

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Telephone:

---

Date of birth:

---

3. Name:

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Address:

---

Telephone:

---

Date of birth:

---

4. Name:

---

Address:

---

Telephone:

---

Date of birth:

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# My financial details

## Savings/Cheque/Investment accounts:

1. Branch name: \_\_\_\_\_

Branch address: \_\_\_\_\_

Account name: \_\_\_\_\_

Account number: \_\_\_\_\_

2. Branch name: \_\_\_\_\_

Branch address: \_\_\_\_\_

Account name: \_\_\_\_\_

Account number: \_\_\_\_\_

3. Branch name: \_\_\_\_\_

Branch address: \_\_\_\_\_

Account name: \_\_\_\_\_

Account number: \_\_\_\_\_

## Credit cards:

1. Financial institution: \_\_\_\_\_

Credit card: \_\_\_\_\_

Card number: \_\_\_\_\_

Expiry date: \_\_\_\_\_

2. Financial institution: \_\_\_\_\_

Credit card: \_\_\_\_\_

Card number: \_\_\_\_\_

Expiry date: \_\_\_\_\_

3. Financial institution: \_\_\_\_\_

Credit card: \_\_\_\_\_

Card number: \_\_\_\_\_

Expiry date: \_\_\_\_\_

## Annuities or pensions:

1. Company: \_\_\_\_\_

Member number: \_\_\_\_\_

2. Company: \_\_\_\_\_

Member number: \_\_\_\_\_

3. Company: \_\_\_\_\_

Member number: \_\_\_\_\_

## Superannuation:

1. Company: \_\_\_\_\_

Policy number: \_\_\_\_\_

2. Company: \_\_\_\_\_

Policy number: \_\_\_\_\_

3. Company: \_\_\_\_\_

Policy number: \_\_\_\_\_

## Where my documents are kept

Will: \_\_\_\_\_

Power of attorney document: \_\_\_\_\_

Birth certificate: \_\_\_\_\_

Marriage certificate: \_\_\_\_\_

Credit/charge cards: \_\_\_\_\_

Social security/pension records: \_\_\_\_\_

Property deeds/mortgage papers: \_\_\_\_\_

Lease documents: \_\_\_\_\_

Taxation records: \_\_\_\_\_

Insurance records: \_\_\_\_\_

Pre-paid funeral records: \_\_\_\_\_

# My property details

## Land and houses:

1. Address:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Name on title:  
 \_\_\_\_\_

2. Address:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Name on title:  
 \_\_\_\_\_

## Mortgages (if property is mortgaged):

1. Mortgage:  
 \_\_\_\_\_  
 Address:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

2. Mortgage:  
 \_\_\_\_\_  
 Address:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

3. Mortgage:  
 \_\_\_\_\_  
 Address:  
 \_\_\_\_\_  
 \_\_\_\_\_

# My insurance details

## House and contents insurance:

1. Company:  
 \_\_\_\_\_

Policy number:  
 \_\_\_\_\_

2. Company:  
 \_\_\_\_\_

Policy number:  
 \_\_\_\_\_

3. Company:  
 \_\_\_\_\_

Policy number:  
 \_\_\_\_\_

## Personal life insurance:

1. Company:  
 \_\_\_\_\_

Policy number:  
 \_\_\_\_\_

## Motor vehicle insurance:

### Vehicle 1

Comprehensive number:  
 \_\_\_\_\_

Greenslip number:  
 \_\_\_\_\_

### Vehicle 2

Comprehensive number:  
 \_\_\_\_\_

Greenslip number:  
 \_\_\_\_\_

## My business interests

I am employed by:

\_\_\_\_\_

\_\_\_\_\_

Date employed:

\_\_\_\_\_

\_\_\_\_\_

Position/Title:

\_\_\_\_\_

Salary: \$

Per:

\_\_\_\_\_

Location of any employment agreement:

\_\_\_\_\_

Bonuses: \$

How paid:

\_\_\_\_\_

\_\_\_\_\_

Incentive Pay: \$

How paid:

\_\_\_\_\_

Compensation agreements:

\_\_\_\_\_

Remarks:

\_\_\_\_\_

\_\_\_\_\_

Other business interests:

\_\_\_\_\_

## My investment interests

I have the following investments/assets:

Company	Bought	Date	\$ Cost	\$ Value
1				
2				
3				
4				

## My liabilities/debts

My liabilities/debts are as follows:

1.

\_\_\_\_\_

3.

\_\_\_\_\_

2.

\_\_\_\_\_

4.

\_\_\_\_\_

## My other details

Pre-paid funeral plan:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Preferred funeral directors:

\_\_\_\_\_

\_\_\_\_\_

Burial/cremation instructions:

\_\_\_\_\_

Pre-paid cemetery or crematorium plot number:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## My contacts

### **Executor:**

Full name:

---

Address:

---

---

Relationship:

---

Phone:

---

### **Power of attorney:**

Full name:

---

Address:

---

---

Phone:

---

### **Doctor:**

Full name:

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Address:

---

---

Phone:

---

### **Solicitor:**

Full name:

---

Address:

---

---

Phone:

---

### **Accountant:**

Full name:

---

Address:

---

---

Phone:

---

### **Financial planner:**

Full name:

---

Address:

---

---

Phone:

---

### **Stockbroker:**

Full name:

---

Address:

---

---

Phone:

---

### **Minister or priest:**

Full name:

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Address:

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---

Phone:

---

### **Next of kin:**

Full name:

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Address:

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Phone:

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## My specific gifts

This section is for the provision of specific gifts. There may be treasured items that you wish to leave to someone special. If so, we recommend that you fill out the details below, then place the corresponding asset label provided alongside this list on the back of, or underneath the relevant item.

1. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

2. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

3. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

4. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

5. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

6. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

7. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

8. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

9. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

10. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

11. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

12. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

13. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

14. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

15. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

16. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

17. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

18. Item: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_

## My pets (and who I would like to look after them)

1. Pet's name: \_\_\_\_\_

Breed: \_\_\_\_\_

Carer's name: \_\_\_\_\_

Telephone: \_\_\_\_\_

2. Pet's name: \_\_\_\_\_

Breed: \_\_\_\_\_

Carer's name: \_\_\_\_\_

Telephone: \_\_\_\_\_



## Contact us

(02) 9263 5548  
[wesleymission.org.au/wills](http://wesleymission.org.au/wills)  
[willsdays@wesleymission.org.au](mailto:willsdays@wesleymission.org.au)

## Get involved

To volunteer, donate or leave a gift in your Will  
visit [wesleymission.org.au](http://wesleymission.org.au)

Wesley Mission  
220 Pitt Street, Sydney NSW 2000  
PO Box A5555, Sydney South NSW 1235  
(02) 9263 5555  
[communications@wesleymission.org.au](mailto:communications@wesleymission.org.au)  
[wesleymission.org.au](http://wesleymission.org.au)

CEO and Superintendent: Rev Stu Cameron  
ABN 42 164 655 145 Wesley Mission is a part of the Uniting Church in Australia.

**Do all the good you can** because every life matters