



AfterLife

Documents & Information Checklist

Live well today. Leave life organised tomorrow.

Use this checklist to identify the documents, accounts, contacts and personal instructions that may be needed by the people helping you in an emergency or after your death. It is a planning tool - not a place to record sensitive access credentials.

NAME		DATE STARTED	
REVIEWED WITH		NEXT REVIEW	

Keep this checklist safe. Do not write passwords, PINs, safe combinations, private keys, full account numbers or security answers on these pages. Record only where secure access instructions or the original documents are stored.

HOW TO USE IT

☐	HAVE - the information is current and easy to locate.
☐	UPDATE - it is missing, out of date or needs attention.
☐	N/A - it does not apply to you.

Review this checklist at least once a year, and after major life events such as a relationship change, house move, new child, business change, serious illness or a change of executor.

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1 Will, legal and identity

Locate the original documents and confirm they reflect your current wishes and circumstances.

DOCUMENT OR INFORMATION	HAVE	UPDATE	N/A	WHERE IT IS KEPT / WHO HOLDS IT
Current signed Will and its original location	☐	☐	☐	
Executor details and any substitute executors	☐	☐	☐	
Enduring Power of Attorney	☐	☐	☐	
Advance Care Directive or medical decision-maker documents	☐	☐	☐	
Guardianship documents, where relevant	☐	☐	☐	
Birth certificate	☐	☐	☐	
Marriage, civil partnership, divorce or separation documents	☐	☐	☐	
Passport, driver licence and other identity documents	☐	☐	☐	
Trust deeds, company constitutions or partnership agreements	☐	☐	☐	
Binding death benefit nomination or other beneficiary directions	☐	☐	☐	
Court orders, settlements or other legal agreements	☐	☐	☐	
Lawyer or solicitor contact details	☐	☐	☐	

Helpful question: Could a trusted person identify what exists, locate the original record and understand who to contact - without needing confidential credentials written here?

2

Property, vehicles and possessions

Record where ownership, finance, insurance and practical access information can be found.

DOCUMENT OR INFORMATION	HAVE	UPDATE	N/A	WHERE IT IS KEPT / WHO HOLDS IT
Property title, deed or ownership records	☐	☐	☐	
Mortgage, lease and property loan documents	☐	☐	☐	
Council rates, water, body corporate or strata information	☐	☐	☐	
Home, contents, landlord or property insurance	☐	☐	☐	
Vehicle registration, finance and insurance	☐	☐	☐	
Keys, alarm information and secure access instructions	☐	☐	☐	
Safe or safety deposit box location (not the combination)	☐	☐	☐	
Storage units, sheds or off-site property	☐	☐	☐	
List of valuable or sentimental possessions	☐	☐	☐	
Items borrowed, lent or held for another person	☐	☐	☐	
Instructions for pets, animals or property care	☐	☐	☐	

Helpful question: Could a trusted person identify what exists, locate the original record and understand who to contact - without needing confidential credentials written here?

3

Banking, debts and investments

Help your executor understand what you own, what you owe and where financial records are held.

DOCUMENT OR INFORMATION	HAVE	UPDATE	N/A	WHERE IT IS KEPT / WHO HOLDS IT
Bank and credit union accounts	☐	☐	☐	
Credit cards and charge cards	☐	☐	☐	
Home, personal and other loan accounts	☐	☐	☐	
Family or personal loans you owe	☐	☐	☐	
Money or loans owed to you	☐	☐	☐	
Shares, managed funds and investment platforms	☐	☐	☐	
Term deposits, bonds or other investments	☐	☐	☐	
Cryptocurrency and secure access instructions	☐	☐	☐	
Payment services such as PayPal or digital wallets	☐	☐	☐	
Buy-now-pay-later and similar accounts	☐	☐	☐	
Regular direct debits and recurring payments	☐	☐	☐	
Current list of assets and liabilities	☐	☐	☐	
Financial adviser, broker or investment manager details	☐	☐	☐	

Helpful question: Could a trusted person identify what exists, locate the original record and understand who to contact - without needing confidential credentials written here?

4 Insurance, superannuation and tax

Check that policies, nominations and tax records are current and accessible.

DOCUMENT OR INFORMATION	HAVE	UPDATE	N/A	WHERE IT IS KEPT / WHO HOLDS IT
Life insurance policy information	☐	☐	☐	
Income protection, trauma or total and permanent disability cover	☐	☐	☐	
Private health insurance	☐	☐	☐	
Home, contents, vehicle and general insurance	☐	☐	☐	
Business or professional insurance	☐	☐	☐	
Superannuation account information	☐	☐	☐	
Superannuation beneficiary nominations	☐	☐	☐	
Tax file number location (do not write the full number here)	☐	☐	☐	
Recent tax returns and Australian Taxation Office records	☐	☐	☐	
Overseas tax, pension or retirement information	☐	☐	☐	
Accountant or tax adviser contact details	☐	☐	☐	

Helpful question: Could a trusted person identify what exists, locate the original record and understand who to contact - without needing confidential credentials written here?

5

Business, work and household services

Include the information needed to manage employment, a business and essential ongoing services.

DOCUMENT OR INFORMATION	HAVE	UPDATE	N/A	WHERE IT IS KEPT / WHO HOLDS IT
Employment contract and employer contact details	☐	☐	☐	
Payroll, leave, entitlements and employee benefits	☐	☐	☐	
Business ownership and registration documents	☐	☐	☐	
Business banking, finance and accounting records	☐	☐	☐	
Key staff, customer, supplier and contractor contacts	☐	☐	☐	
Licences, permits and professional registrations	☐	☐	☐	
Business insurance and succession arrangements	☐	☐	☐	
Intellectual property, websites and domain ownership	☐	☐	☐	
Power, gas, water, phone and internet accounts	☐	☐	☐	
Memberships, associations and recurring subscriptions	☐	☐	☐	
Important household or property service providers	☐	☐	☐	

Helpful question: Could a trusted person identify what exists, locate the original record and understand who to contact - without needing confidential credentials written here?

6

Digital life and online accounts

Use secure access instructions. Never place actual passwords, recovery codes or private keys on this checklist.

DOCUMENT OR INFORMATION	HAVE	UPDATE	N/A	WHERE IT IS KEPT / WHO HOLDS IT
Password manager and emergency-access instructions	☐	☐	☐	
Primary and secondary email accounts	☐	☐	☐	
Mobile phone account and device access instructions	☐	☐	☐	
Computers, tablets and other devices	☐	☐	☐	
Cloud storage, iCloud, Google Drive or similar services	☐	☐	☐	
Social media accounts	☐	☐	☐	
Websites, domain names and online businesses	☐	☐	☐	
Online shopping and payment accounts	☐	☐	☐	
Streaming, gaming and entertainment services	☐	☐	☐	
Digital photos, videos and personal archives	☐	☐	☐	
Important mobile apps and online subscriptions	☐	☐	☐	
Instructions for closing, preserving or memorialising digital accounts	☐	☐	☐	

Helpful question: Could a trusted person identify what exists, locate the original record and understand who to contact - without needing confidential credentials written here?

7 Important people, dependants and care

List the people who may need to act, give advice, provide care or be contacted promptly.

DOCUMENT OR INFORMATION	HAVE	UPDATE	N/A	WHERE IT IS KEPT / WHO HOLDS IT
Dependants and any immediate care arrangements	☐	☐	☐	
Children, guardians and school or childcare contacts	☐	☐	☐	
Pet care, veterinary and rehoming instructions	☐	☐	☐	
Doctors, specialists and other health professionals	☐	☐	☐	
People who should be notified promptly	☐	☐	☐	

IMPORTANT CONTACTS

ROLE / RELATIONSHIP	NAME	PHONE / EMAIL	NOTES
Executor / administrator			
Partner / closest family			
Lawyer / solicitor			
Accountant / tax adviser			
Financial adviser / broker			
Doctor / health contact			
Employer / business contact			
Pet / dependant care contact			
Funeral director / celebrant			
Other important person			

8

Funeral, memorial and personal wishes

These preferences may be stored in more detail in your AfterLife Vault. Use this page to confirm that guidance exists and can be found.

DOCUMENT OR INFORMATION	HAVE	UPDATE	N/A	WHERE IT IS KEPT / WHO HOLDS IT
Funeral, memorial or celebration-of-life preference	☐	☐	☐	
Burial, cremation or other arrangements	☐	☐	☐	
Organ and tissue donation wishes	☐	☐	☐	
Preferred funeral director, if one has been selected	☐	☐	☐	
Service location, format or attendance wishes	☐	☐	☐	
Music, readings, speakers or people to involve	☐	☐	☐	
Cultural, spiritual or religious wishes	☐	☐	☐	
Obituary, eulogy or life-story notes	☐	☐	☐	
Flowers, donations or charitable preferences	☐	☐	☐	
Clothing, jewellery or personal items	☐	☐	☐	
Ashes, memorial or final resting-place wishes	☐	☐	☐	
Prepaid funeral plan, bond or insurance	☐	☐	☐	
Letters, messages, memories or recordings for loved ones	☐	☐	☐	
Other personal wishes your executors should understand	☐	☐	☐	

Remember: Some wishes may not be legally binding or may be impossible to carry out exactly. Discuss anything especially important with your executor, family and professional advisers.

FINAL REVIEW	YOUR NOTES
My five most important next steps	1. 2. 3. 4. 5.
The completed checklist will be kept	
A trusted person who knows where it is	

My next review date	
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Completed your review? Store the supporting records securely and make sure at least one trusted person knows how to find the information they will need. This checklist is general information only and is not legal, financial or tax advice.