



Blue Tulip Co.

The caring starts here

Where my important documents are

A record for the people you trust.

Fill this in, then tell your trusted people where this sheet is kept. It can save them hours of searching at the worst possible time.

Last updated: _____ **Review by:** _____

Don't write full passwords, PINs or account numbers here. Just note where the password manager or list can be found.

THE KEY DOCUMENTS

Will *Where is it kept? Who prepared it?*

Enduring Power of Attorney (financial & medical) *Where is it, and who is appointed?*

Advance Care Directive *Where is it? Do the GP / hospital have a copy?*

Funeral wishes *Burial or cremation? Any prepaid plan or bond?*

MONEY & ASSETS

Bank(s) and accounts *Which banks? Where are the details kept?*

Superannuation fund(s) *Which funds? Is a binding nomination in place?*

Old super funds *Ones you stopped paying into. Insurance may still sit inside them.*

Life insurance *Inside super and/or standalone? Where is the policy held?*

Property & title deeds *Where are the deeds or mortgage papers?*

Loans & mortgages *Mortgage, personal loans, credit cards, buy-now-pay-later.*

Accountant / financial adviser *Name and contact*

DIGITAL & DAY-TO-DAY

Password manager or list *Where is it, and who has the master access?*

Email & key online accounts *Where is this noted?*

Subscriptions & regular bills *Where are these listed?*

Pets *Who has agreed to take them?*

Utilities & direct debits *Electricity, gas, water, internet, phone — and anything that keeps taking money.*

WHO TO CONTACT

People who should be told *Names and phone numbers*

Solicitor / executor *Name and contact*

Where this sheet is kept *Tell your trusted people*
