



Blue Tulip Co.

The caring starts here

## Planning ahead

*Getting your affairs in order.*

A little done now spares the people you love a great deal later. Start at the top — you can build the rest over time.

### START HERE

- |                                                                                                             |            |
|-------------------------------------------------------------------------------------------------------------|------------|
| <input type="checkbox"/> <b>Make a will</b><br>DIY, online, or solicitor. Just do it.                       | THIS MONTH |
| <input type="checkbox"/> <b>Set up Enduring Power of Attorney</b><br>Financial and medical decision-makers. | THIS MONTH |
| <input type="checkbox"/> <b>Write an Advance Care Directive</b><br>Talk to your GP first.                   | THIS MONTH |

### QUICK WINS

- |                                                                                                                                             |       |
|---------------------------------------------------------------------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> <b>Register as an organ donor</b><br>Takes 1 minute at <a href="https://donatelife.gov.au">donatelife.gov.au</a> . | TODAY |
|---------------------------------------------------------------------------------------------------------------------------------------------|-------|

### BUILD OVER TIME

- |                                                                                                                                              |              |
|----------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| <input type="checkbox"/> <b>Record your wishes</b><br>Funeral, messages, money, care — work through it section by section, at your own pace. | ONGOING      |
| <input type="checkbox"/> <b>Nominate trusted people</b><br>Who gets access to your information.                                              | AFTER WISHES |
| <input type="checkbox"/> <b>Tell family where your documents are</b><br>Will, EPOA, Advance Care Directive.                                  | AFTER SETUP  |

### ANNUAL REVIEW

- |                                                                                                                     |           |
|---------------------------------------------------------------------------------------------------------------------|-----------|
| <input type="checkbox"/> <b>Review super nominations</b><br>Check binding nominations have not lapsed.              | THIS YEAR |
| <input type="checkbox"/> <b>Set up a digital legacy plan</b><br>Password manager, digital executor, account wishes. | THIS YEAR |