



The Goodbye Guide

End of Life Planner Checklist

Council on the Ageing Western Australia Inc.



ADDRESS

61 Kitchener Avenue
Victoria Park, 6100
Western Australia



PHONE

P : (08) 9472 0104



EMAIL

policy@cotawa.org.au
www.cotawa.org.au



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Having all of your paperwork up to date and in one place and informing someone of its location, will make it easier if a family member or trusted friend has to help you with financial and legal matters.

The documents listed in this release are intended to be a guide only; some documents listed may not be applicable to you. There may be other documents not listed which are unique to you and your situation that you may also wish to include.



The Checklist

Item Description	Yes / No	Comments
Proof of Identity		
Birth Certificate	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Marriage or Divorce Certificates	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Citizenship Certificate	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Passport	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Legal Documents		
<p>Your Will</p> <p>Your will is a legal document which expresses your wishes in regard to your estate after your death. The WA Will Bank is a community service that offers Western Australians safe Will storage.</p> <p>www.publictrustee.wa.gov.au</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<p>Advance Health Directive</p> <p>An Advance Health Directive (AHD) is a legal document that enables you to make decisions now about the treatment you would want - or not want - to receive if you ever became sick or injured and were incapable of communicating your wishes.</p> <p>www.health.wa.gov.au</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Item Description	Yes / No	Comments
<p>Advance Care Plan Western Australia allows for informal advance care planning documentation and an Advance Care Plan with general statements about preferences and values. You can record additional personal wishes not covered in the Advance Health Directive or Enduring Power of Guardianship. This form records additional personal wishes not covered in other formal documents. Your preferences may not necessarily be health related but will guide your treating health professionals. www.health.wa.gov.au</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<p>Enduring Power of Attorney An Enduring Power of Attorney is a legal agreement that enables a person to appoint a trusted person/s to make financial and/or property decisions on their behalf. For actions concerning property, Enduring Power of Attorney documents must be lodged and registered with Landgate (Register of Titles). www.publicadvocate.wa.gov.au</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<p>Enduring Power of Guardianship An Enduring Power of Guardianship is a legal document that authorises a person of your choice to make important personal, lifestyle and treatment decisions on your behalf should you ever become incapable of making such decisions yourself. www.publicadvocate.wa.gov.au</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<p>Pension / Benefits / Superannuation</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<p>Centrelink / Veterans Affairs Details</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<p>Overseas Payments</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	

Item Description	Yes / No	Comments
<p>Superannuation</p> <p>Your super cannot typically be covered by your will. Your super is held for you in a trust by your super fund trustee and governed by superannuation law, which is why different rules apply and why your super fund must be kept up to date with your instructions. To ensure you have appropriately nominated beneficiary arrangements in place for your super money;</p> <ul style="list-style-type: none"> • Check your super fund offers beneficiary arrangements that suit your circumstances • Check that those you are nominating are eligible • If you plan to nominate your legal personal representative, make sure your will is up to date • Complete and sign a nomination of beneficiary/ies form and send the form to your fund • If your nominations are lapsing, make sure you review and renew them before they expire. 	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<p>Confidential Information</p>		
<p>You may like to leave directions as to where the details of confidential information are located. E.g. Tax File Number, MyGOV and bank logins and passwords</p>		
<p>Health</p>		
<p>Medicare Details</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<p>Private Health Fund Details</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Item Description	Yes / No	Comments
Home Support Details of any arrangements in place	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Financial Matters		
Bank and Credit Card Account Information Include online banking details	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Direct Debits Providing a list of your direct debits will prevent your estate from paying bills unnecessarily.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Property Deeds, Titles and Lease Documents These include the title to your house and land. If the property is under mortgage, the original title will be held by the mortgage lending institution. Lease documents will provide details of the property you are leasing.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Mortgage and any other loans Include details of mortgage/loan lending institution and copies of loan agreement documentation.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Investment Details and Documentation These provide evidence of your title to financial dividends. E.g. shares and stocks.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Taxation Records Keep copies of your most recent tax return.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Household Utilities Account Information Includes details for telephone, electricity, gas etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Pre-paid Funeral or Memorial Information Any arrangements that you have made about your funeral, burial or memorial, particularly any pre-paid contract with a funeral provider or cemetery.	Yes No	

Item Description	Yes / No	Comments
Vehicle Registrations and Licences		
Include the licence and registration details of: <ul style="list-style-type: none"> • Car • Boats • Caravans • Driver's Licence Details 	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Digital Assets		
Social Media Accounts Facebook, Instagram, Twitter, LinkedIn etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Online Retail and Payment Systems Ebay, Amazon etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Digital items including movies, games, e-books etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Subscriptions Streaming services. E.g. Netflix and newspapers.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Pets		
Pet Ownership and Care Instructions Make certain that your pet/s have a good home. The person caring for your pet/s will need detailed care information including feeding instructions, medication schedule, exercise and grooming requirements, the name of their vet, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No	



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