

Name



Essential Personal Information

**Prepared by the Northern Beaches branch
Retired & Former Police Association of NSW**

2024

Personal Information	
A Confidential Record	<p>The purpose of this Personal Information Sheet is to help your family with personal information in the difficult time following bereavement.</p> <p>This document is for your personal record.</p> <p>Please note this is not a legal document and does not replace a will. Be sure you have made a will and that it is kept up to date.</p> <p>Please fill in this sheet if you are:</p> <ul style="list-style-type: none">• single or widowed• married (both husband and wife should fill in an individual form)• a defacto couple (both partners should fill in an individual form) <p>Please:</p> <ul style="list-style-type: none">• fill in as much information as you can• keep it in a folder in a separate place from your other important documents as this is the index of where they are kept• let your family and friends know where it is kept

A checklist of papers which should be in order and kept in a safe place

- Birth and Marriage Certificates** - These documents contain important family details.
- Your Will** - This is a legal document which expresses your wishes in regard to distribution of your property after your death. It authorises a person (your executor) to act according to your wishes. It also prevents confusion arising among dependants, relatives and friends. It should reflect your current wishes.
- Property Deeds** - These include title to your house and Land. They prove ownership of property. If the property is under mortgage, the original title will be held by the mortgagee(bank, building society etc.)
- Lease Agreements** - These papers provide details in relation to any property that you are leasing
- Taxation Records** - You should keep copies of at least your most recent returns and assessments. This assists someone in deciding how to deal with financial affairs.
- Insurance Policies** - Includes policies for house or personal effects - Records rights under the policy as well as procedures for renewal or cancellation
- Life Assurance/Superannuation Policies** - These provide a record of payments and income to which you are entitled
- Papers representing other Assets:** Shares, Debentures ETC. - These represent your title to sometimes quite valuable property
- Details of Bank Accounts and Other Investments:** see also enclosed personal information sheet - It provides information as to where money is held.

The above papers should be kept in a secure place (e.g. bank safe deposit, trustee company, solicitor etc.). The enclosed person information sheet allows you to record the places in which these papers are kept.

Personal Information Sheet

Personal Details:

Full Name

Address

Date of Birth

Place of Birth

Police Service No

War Service (tick if relevant)

 Army

 Navy

 Air Force

In Case of Emergency:

Full Name

Address

Mobile

Home Phone

Contact

Family Details:

Name of Spouse or partner

Maiden name (if appropriate)

Marriage Date

Place of Marriage

Name of children

Personal Information Sheet

Family Details:

Your father's name

Date of birth

Place of birth

Your mother's name

Maiden name

Date of birth

Place of birth

Medical Details:

Your Medical Practitioner's Name

Address

Telephone

Medicare Number

Health Fund Name

Membership Number

Phone Number

Address/Website

Personal Information Sheet

Bank Account Details:

1.	Bank	<input type="text"/>
	BSB	<input type="text"/>
	Account No	<input type="text"/>
2.	Bank	<input type="text"/>
	BSB	<input type="text"/>
	Account No	<input type="text"/>
3.	Bank	<input type="text"/>
	BSB	<input type="text"/>
	Account No	<input type="text"/>

Other Investments (including shares, stocks, debentures, bonds, properties etc.)

Superannuation details:

1.	Name of Fund	<input type="text"/>
	Contact	<input type="text"/>
2.	Name of Fund	<input type="text"/>
	Contact	<input type="text"/>

<h1 style="text-align: center;">Personal Information Sheet</h1>	<p>Life Insurance Details:</p> <p>1. Company Policy Number</p> <p>2. Company Policy Number</p> <p>Income Protection Insurance:</p> <p>Company Policy Number</p>	
		<p>Veteran Affairs and Centrelink pension details:</p> <p>Veteran Affairs Pension Number <input type="text"/></p> <p>Centrelink Customer Reference Number (CRN) <input type="text"/></p>
		<p>Safe Deposit Details:</p> <p>Location: <input type="text"/></p> <p>Access:</p>
		<p>Property Details:</p> <p>Ownership/Mortgage Details:</p> <div style="border: 1px solid black; padding: 5px; min-height: 100px;"> <hr/><hr/><hr/><hr/> </div> <p>Location of titles</p> <input type="text"/>

Personal Information Sheet

Will Details:

Location of Will

Executor's Name

Executor's Phone

Executor's Address

Solicitor's Name

Solicitor's Phone

Solicitor's Address

Funeral Arrangements:

Burial

Cremation

Cemetery(including existing allotment)

Organ Donation

Yes

No

Special Requests e.g. no flowers, speakers, undertaker, etc.

Other Details