



Your checklist for planning ahead

For more information on each of the documents listed please refer to our information brochures.

Will

- ☐ Executor – the full name(s) of who you wish to manage your estate. This should be a trusted person.
- ☐ Details of your assets eg. Property, bank accounts, shares etc.
- ☐ Beneficiaries – the full name(s) of who you want to receive your assets.
- ☐ Any specific gifts you would like to make eg. Jewellery, car etc.
- ☐ Any specific funeral wishes

Enduring Power of Attorney

- ☐ Attorney – the full name(s) and address of who you want to manage your property and financial affairs. This should be a trusted and responsible person.
- ☐ Which powers you would like to give your attorney. You can give them only specific powers or general powers.
- ☐ When you would like your enduring power of attorney to start operating – once you lose mental capacity or immediately.

Enduring Guardianship (NSW Only)

- ☐ Guardian – the full name(s) and address of who you want to make health and lifestyle decisions on your behalf. This should be a trusted and responsible person.
- ☐ Which areas you would like your guardian to have control over. You can list specific areas or general areas.
- ☐ Consider if there are any specific directions you would like to give your guardian.

Advanced Care Planning and Directives

- ☐ Discuss your future medical wishes with your family and your doctor.
- ☐ Complete an Advanced Care Directive.
- ☐ Ask your doctor to record your Advance Care Directive in your medical records.

Superannuation

- ☐ Make a binding death nomination.

Storage

- ☐ Decide where you will store your documents and let your family know. You can store your documents at Barker & Barker Solicitors free of charge.