

Planning Plan B Checklist

Documentation required	Completed	Filed
Death		
Will		
Life Insurance policy		
Birth Certificate		
Power of Attorney		
Enduring Power of Attorney		
Statement of Wishes		
List of assets		
List of liabilities		
Passwords		
Online access details		
Any information for the Funeral Service		
Death of a spouse or dependant		
Will		
Life Insurance policy		
Birth certificate		
Power of Attorney		
Enduring Power of Attorney		
Statement of Wishes		
List of assets		
List of liabilities		
Password		
Online access details		
Any information for the Funeral Service		
Divorce – without kids		
Agreed asset allocation and worst case scenario plan		
Prenuptial Agreement (if not signed under duress)		
Information on the joint family assets and income		
Contact details – lawyer, mediator,		
Information for useful organisations		
Marriage certificate		
Birth certificate		
Updated Superannuation Binding Nominations		
Financial position at date of marriage		

Planning Plan B Checklist - Continued

Documentation required	Completed	Filed
Divorce – with kids		
Contact details – lawyer, mediator, Information and useful organisations		
Marriage certificate		
Birth certificate		
Birth certificates of children		
Children’s passports		
Financial position at date of marriage		
Disability or incapacity due to accident or illness		
Income Protection Insurance		
Total and Permanent Disability Cover		
Are you covered by workers’ compensation insurance?		
Contact details – insurer, doctor, etc		
Dismissal from employment		
Employment contract		
Timeline of events, performance review records and correspondence		
Contact details of lawyer, tribunal		
Do you have a financial safety net in the vent you are asked to leave work?		
Redundancy Insurance		
Access to other funds to cover everyday living expenses while you seek new employment?		
Disaster occurring whilst travelling		
Travel Insurance		
Travel itinerary and contact details with a family member or friend		
Confirmation of details on Smartraveller		
Copy of passport		
Copy of birth certificate		
Copy of marriage or divorce certificates		
Copy of vaccination record		
First aid certificate		

Planning Plan B Checklist - Continued

Documentation required	Completed	Filed
Dissolution of a business for unforeseen or financial reasons		
Business Plan		
Insurance		
Real time accounting records		
Risk management plan		
Original structure documentation ie trust deed, certificate of incorporation		
Business owner agreements		
Passwords for all business applications		
Back up of critical information		
Occupational Health and Safety records		
Any other required government or professional records ie tax agent registration, Certificate of Professional Practice etc		
Depression or mental illness		
Income protection insurance		
Total and Permanent Disability Insurance		
Trauma Insurance		
Power of Attorney		
Enduring Power of Attorney		
Advance care plan		
Password information for online applications with a close family member or friend		
Private Health Insurance		
Distressed Sale of Home		
Income Protection Insurance		
Mortgage Protection Insurance		
Title deed		
Loan documentation		
Building clearance certificates		
Market Valuation		