# Planning Plan B Checklist

<table>
<thead>
<tr>
<th>Documentation required</th>
<th>Completed</th>
<th>Filed</th>
</tr>
</thead>
</table>

## Death

<table>
<thead>
<tr>
<th>Item</th>
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</thead>
<tbody>
<tr>
<td>Will</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Life Insurance policy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Birth Certificate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Power of Attorney</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enduring Power of Attorney</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statement of Wishes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>List of assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>List of liabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Passwords</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online access details</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any information for the Funeral Service</td>
<td></td>
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</tbody>
</table>

## Death of a spouse or dependant

<table>
<thead>
<tr>
<th>Item</th>
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<tbody>
<tr>
<td>Will</td>
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</tr>
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<td>List of assets</td>
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<tr>
<td>List of liabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Password</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online access details</td>
<td></td>
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</tr>
<tr>
<td>Any information for the Funeral Service</td>
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</tbody>
</table>

## Divorce – without kids

<table>
<thead>
<tr>
<th>Item</th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Agreed asset allocation and worst case scenario plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prenuptial Agreement (if not signed under duress)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information on the joint family assets and income</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact details – lawyer, mediator,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information for useful organisations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marriage certificate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Birth certificate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Updated Superannuation Binding Nominations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial position at date of marriage</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Planning Plan B Checklist - Continued

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<thead>
<tr>
<th>Documentation required</th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Divorce – with kids</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact details – lawyer, mediator,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information and useful organisations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marriage certificate</td>
<td></td>
<td></td>
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<tr>
<td>Birth certificate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Birth certificates of children</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Children’s passports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial position at date of marriage</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Disability or incapacity due to accident or illness</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Income Protection Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total and Permanent Disability Cover</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you covered by workers’ compensation insurance?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact details – insurer, doctor, etc</td>
<td></td>
<td></td>
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<tr>
<td><strong>Dismissal from employment</strong></td>
<td></td>
<td></td>
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<tr>
<td>Employment contract</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeline of events, performance review records and correspondence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact details of lawyer, tribunal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do you have a financial safety net in the vent you are asked to leave work?</td>
<td></td>
<td></td>
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<tr>
<td>Redundancy Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to other funds to cover everyday living expenses while you seek new employment?</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Disaster occurring whilst travelling</strong></td>
<td></td>
<td></td>
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<tr>
<td>Travel Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel itinerary and contact details with a family member or friend</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confirmation of details on Smartraveller</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copy of passport</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copy of birth certificate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copy of marriage or divorce certificates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copy of vaccination record</td>
<td></td>
<td></td>
</tr>
<tr>
<td>First aid certificate</td>
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</table>
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<tr>
<th>Documentation required</th>
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<tbody>
<tr>
<td><strong>Dissolution of a business for unforeseen or financial reasons</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Plan</td>
<td></td>
<td></td>
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<tr>
<td>Insurance</td>
<td></td>
<td></td>
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<tr>
<td>Real time accounting records</td>
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<td></td>
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<tr>
<td>Risk management plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Original structure documentation ie trust deed, certificate of incorporation</td>
<td></td>
<td></td>
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<tr>
<td>Business owner agreements</td>
<td></td>
<td></td>
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<tr>
<td>Passwords for all business applications</td>
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<tr>
<td>Back up of critical information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Occupational Health and Safety records</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any other required government or professional records ie tax agent registration, Certificate of Professional Practice etc</td>
<td></td>
<td></td>
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<tr>
<td><strong>Depression or mental illness</strong></td>
<td></td>
<td></td>
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<tr>
<td>Income protection insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total and Permanent Disability Insurance</td>
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<td></td>
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<tr>
<td>Trauma Insurance</td>
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<tr>
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<tr>
<td>Enduring Power of Attorney</td>
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<tr>
<td>Advance care plan</td>
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<tr>
<td>Password information for online applications with a close family member or friend</td>
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<tr>
<td>Private Health Insurance</td>
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<tr>
<td><strong>Distressed Sale of Home</strong></td>
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<tr>
<td>Income Protection Insurance</td>
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<tr>
<td>Mortgage Protection Insurance</td>
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<tr>
<td>Title deed</td>
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<tr>
<td>Loan documentation</td>
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<tr>
<td>Building clearance certificates</td>
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</tr>
<tr>
<td>Market Valuation</td>
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</tbody>
</table>