

Personal Information

This section covers your identity. Your full legal name, your date of birth, where you were born, and the documents that prove all of it.

Fill in what applies. If you don't have something (for example, if you've never had a passport), just write "N/A" so your executor knows you considered it.

Here's what to include:

Your full legal name. The name on your birth certificate, not the name you go by. If your legal name is "Margaret" but everyone calls you "Maggie," write Margaret. Your executor needs the legal version for official documents.

Your date and place of birth. Day, month, year, and the town or city where you were born. This information appears on almost every legal form your executor will fill out.

Your Tax File Number (TFN). Your executor will need this to lodge your final tax return and deal with the ATO. Keep it somewhere secure, but make sure they can find it.

Your Medicare number. Same reason as your TFN. Government agencies will ask for it.

Your driver licence number. If you have one, include the number and the state or territory that issued it. This helps with identification.

Your passport number. If you have a current passport (or an expired one), note the number and where it's stored. If you don't have one, write "N/A."

Birth certificates. Your own, and any for immediate family members who might be beneficiaries (your children, for example). Note where the originals are stored. If you only have copies, say so.

Marriage certificates. If you're married, your executor will need proof. If you've been married more than once, include certificates for all marriages.

Divorce or separation documents. If you're divorced, your executor needs to know. In most states and territories a divorce can change how parts of a Will are read, especially if your Will was written before the divorce, so it's worth checking yours with your solicitor. Note where the originals are kept. Note where the originals are kept.

WHY THIS MATTERS

Without this information, your executor can't prove who you are. And if they can't prove who you are, they can't access your bank accounts, sell your property, or distribute your estate.

It's dull admin. But it's the admin that matters most.

Fill it in, and you've just saved your executor days of searching.

Your Personal Information

Start with the basics - the first details your family will need.

FULL LEGAL NAME	ALSO KNOWN AS
DATE OF BIRTH	PLACE OF BIRTH
TAX FILE NUMBER	MEDICARE NUMBER
DRIVER LICENCE NUMBER	STATE / TERRITORY
PASSPORT NUMBER	COUNTRY OF ISSUE

IMPORTANT DOCUMENTS

Tick what you have, and note where each original is kept.

Birth Certificate

Have original Have copy Don't have

STORED AT

Marriage Certificate

Have original Have copy Don't have

STORED AT

Your Personal Information (cont.)

Divorce Certificate

Have original

Have copy

Don't have

STORED AT

Other Document

Have original

Have copy

Don't have

STORED AT

NOTES - ANYTHING ELSE YOUR EXECUTOR SHOULD KNOW ABOUT YOUR IDENTITY