

Key Contacts



Not for me: this section does not apply

Tick here and in the Contents, then skip ahead (no need to print it either).

When you die, your executor will need to notify a lot of people.

Some need to know immediately (your spouse, your children, your executor). Others can wait a few days or weeks (your employer, your accountant, your insurance company).

This section gives your executor a complete list so they don't have to guess who to call, or spend hours searching for phone numbers while they're grieving.

Let's break this into two groups: people who need to know right away, and people who need to know eventually.

Who to notify immediately:

Your immediate family. Spouse, children, parents, siblings. These are the people who should hear the news first, directly from your executor (or from each other).

Your executor. If your executor isn't also your spouse or child, they need to be contacted immediately so they can start handling your estate.

Your close friends. The people who would want to know, and who would be hurt if they found out too late.

Who to notify within days or weeks:

Your solicitor. The person who drafted your Will and any other legal documents.

Your accountant. They'll need to lodge your final tax return and handle any outstanding tax matters.

Your financial adviser. If you have one, they'll need to know so they can work with your executor to

manage your investments, super, and other financial matters.

Your employer. If you're still working, your employer needs to be notified so they can process final pay, super contributions, and any leave entitlements.

Your super fund. Your executor will need to claim your super death benefit. Include the fund name and your member number.

Centrelink (if applicable). If you receive any Centrelink payments (Age Pension, Disability Support, Carer Payment), these need to be cancelled.

Your private health insurer (if applicable). So they can cancel your policy and process any final claims.

Your insurance providers. Life insurance, income protection, home and contents, car insurance - all of these need to be notified.

Your aged care facility (if applicable). If you're living in aged care, the facility needs to be informed.

Your religious or community leader (if applicable). Your priest, pastor, imam, rabbi, or community group leader - whoever would help organise your funeral or memorial service.

WHY THIS MATTERS

Your executor shouldn't have to play detective to find these people. And your family shouldn't have to guess who was important to you.

By writing it all down, you're giving them a clear list to work from. They'll know exactly who to call, when to call them, and how to reach them.

That's one less thing they'll need to figure out.

Your Key Contacts

A complete call-list so your executor never has to play detective.

PEOPLE TO NOTIFY IMMEDIATELY

SPOUSE / PARTNER

NAME

PHONE

EMAIL

NOTES

CHILD 1

NAME

PHONE

EMAIL

NOTES

CHILD 2

NAME

PHONE

EMAIL

NOTES

Your Key Contacts (cont.)

PARENT 1

NAME

PHONE

EMAIL

NOTES

PARENT 2

NAME

PHONE

EMAIL

NOTES

SIBLING 1

NAME

PHONE

EMAIL

NOTES

SIBLING 2

NAME

PHONE

Your Key Contacts (cont.)

EMAIL

NOTES

EXECUTOR (IF NOT SPOUSE / CHILD)

NAME

PHONE

EMAIL

NOTES

CLOSE FRIEND 1

NAME

PHONE

EMAIL

NOTES

CLOSE FRIEND 2

NAME

PHONE

EMAIL

NOTES

Your Key Contacts (cont.)

OTHER IMPORTANT CONTACT 1

NAME

PHONE

EMAIL

NOTES

OTHER IMPORTANT CONTACT 2

NAME

PHONE

EMAIL

NOTES

OTHER IMPORTANT CONTACT 3

NAME

PHONE

EMAIL

NOTES

More children, siblings or friends? Add them in the Notes box at the end.

PROFESSIONAL CONTACTS - WITHIN DAYS / WEEKS

Your Key Contacts (cont.)

SOLICITOR

NAME

FIRM

PHONE

EMAIL

ACCOUNTANT

NAME

FIRM

PHONE

EMAIL

FINANCIAL ADVISER

NAME

FIRM

PHONE

EMAIL

EMPLOYER (IF CURRENTLY EMPLOYED)

COMPANY NAME

CONTACT NAME

Your Key Contacts (cont.)

PHONE

EMAIL

SUPERANNUATION FUND

FUND NAME

MEMBER NUMBER

PHONE

CENTRELINK

Centrelink phone: 132 300. Leave blank if not applicable.

REFERENCE NUMBER (CRN)

PAYMENTS RECEIVED

PRIVATE HEALTH INSURANCE

INSURER

MEMBER NUMBER

PHONE

LIFE INSURANCE

INSURER

POLICY NUMBER

Your Key Contacts (cont.)

CONTACT

HOME & CONTENTS INSURANCE

INSURER

POLICY NUMBER

CONTACT

CAR INSURANCE

INSURER

POLICY NUMBER

CONTACT

AGED CARE FACILITY (IF APPLICABLE)

FACILITY NAME

CONTACT PERSON

PHONE

Your Key Contacts (cont.)

RELIGIOUS / COMMUNITY LEADER (IF APPLICABLE)

NAME

ORGANISATION

PHONE

NOTES - ANYONE ELSE WHO SHOULD BE NOTIFIED

Extra Space

More room for your Key Contacts section: extra entries, stories, or anything the boxes could not hold.