

Legal Documents



Not for me: this section does not apply

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

Your executor will need access to various legal documents to settle your estate.

Some of these are essential (your Will, your super nomination, your Power of Attorney). Others might only be relevant in specific situations (divorce orders, prenuptial agreements, guardianship orders).

This section is a checklist of legal documents your executor should know about. For each one, note whether you have it and where it's stored.

WHY THIS MATTERS

Legal documents prove things. They prove you were divorced. They prove you have a binding agreement with your spouse. They prove you have legal authority over someone's care.

If your executor doesn't know these documents exist, they might make decisions based on incomplete information. Or they might spend weeks searching for something they need urgently.

Let's document what you have and where it is.

Your Legal Documents

A master checklist of every legal document, and where to find each one.

WILL & ESTATE DOCUMENTS

Tick what you have and note where the original is kept.

Will

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Codicil (amendment to Will)

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Copy of Will

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

POWER OF ATTORNEY

Enduring Power of Attorney (Financial)

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Enduring Guardian (Medical / Lifestyle)

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Your Legal Documents (cont.)

ATTORNEY'S NAME

GUARDIAN'S NAME

ADVANCE CARE PLANNING

Advance Care Directive / Living Will

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Do Not Resuscitate (DNR) Order

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

SUPERANNUATION

Binding Death Benefit Nomination

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

WHICH SUPER FUND

DATE NOMINATION MADE

MARRIAGE & RELATIONSHIP

Marriage Certificate(s)

☐ Have original ☐ Have copy ☐ Don't have ☐ Not applicable

STORED AT

Your Legal Documents (cont.)

De Facto Relationship Declaration

☐ Have original ☐ Have copy ☐ Don't have ☐ Not applicable

STORED AT

Prenuptial / Financial Agreement

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

PRENUP DATE MADE

PRENUP SOLICITOR

DIVORCE & SEPARATION

Divorce Order / Certificate

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Property Settlement Agreement

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Consent Orders (Family Court)

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

DATE OF DIVORCE

WHAT ORDERS COVER

Your Legal Documents (cont.)

CHILD-RELATED

Children's Birth Certificates

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Guardianship Orders

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Parenting Orders / Custody

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Child Support Agreement

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

ADOPTION

Adoption Orders (if you were adopted)

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Your Legal Documents (cont.)

Adoption Papers (if you adopted)

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

TRUST DOCUMENTS

Family Trust Deed

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

SMSF Trust Deed

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

TRUST NAME(S)

OTHER TRUST DOCUMENTS

BUSINESS LEGAL

Shareholder Agreement

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Partnership Agreement

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Your Legal Documents (cont.)

Buy-Sell Agreement

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Company Constitution

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

PROPERTY

Title Deeds

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Mortgage Documents

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Easements or Covenants

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

HOW MANY PROPERTIES

WHAT THEY COVER

Your Legal Documents (cont.)

IMMIGRATION & CITIZENSHIP

Citizenship Certificate

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Passport

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

Visa Documents

☐ Have original ☐ Have copy ☐ Don't have

STORED AT

COURT ORDERS & OTHER

COURT ORDER TYPE

COURT

DATE

LOCATION OF DOCUMENTS

SUMMARY OF WHAT IT COVERS

OTHER DOCUMENT & LOCATION

Your Legal Documents (cont.)

WHERE DOCUMENTS ARE STORED

GENERAL STORAGE LOCATION

SOLICITOR NAME

FIRM

PHONE

NOTES: ANYTHING ELSE ABOUT YOUR LEGAL DOCUMENTS

Extra Space

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