

Miscellaneous Documents



Not for me: this section does not apply

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

This section is the catch-all for important documents that don't fit neatly into other categories.

Safe deposit box details. Personal safe access. Adoption records. Naturalisation certificates. Military service records. Educational certificates. Professional licences.

These documents might not be legally essential, but they could be important for proving identity, claiming benefits, or understanding your personal history.

Your executor needs to know what documents exist and where to find them.

WHY THIS MATTERS

Some of these documents open doors. Military service records might qualify your family for veterans' benefits. A few professional bodies attach benefits to membership, so it can be worth checking with the issuing body whether anything applies. Safe deposit boxes might contain valuable items or important papers.

If your executor doesn't know these exist, your family could miss out on benefits or lose track of important personal history.

Let's document what you have.

Your Miscellaneous Documents

The records that don't fit anywhere else, but ones your family will be glad you noted down.

SAFE DEPOSIT BOX

Some boxes can't be accessed straight away after death. The bank may ask for probate or other paperwork first, so it's worth checking your bank's policy now.

BANK NAME

BRANCH LOCATION

BOX NUMBER

WHERE IS THE KEY

WHO ELSE HAS ACCESS

WHAT'S IN THE BOX

MILITARY SERVICE RECORDS

Service may qualify family for DVA benefits. DVA: 1800 838 372.

BRANCH

SERVICE NUMBER

YEARS OF SERVICE

RANK

SERVICE RECORDS LOCATION

MEDALS / HONOURS

Your Miscellaneous Documents (cont.)

PROFESSIONAL LICENCE 1

TYPE

ISSUING BODY

LICENCE NUMBER

EXPIRY DATE

CERTIFICATE LOCATION

DEATH BENEFITS ATTACHED?

PROFESSIONAL LICENCE 2

TYPE

ISSUING BODY

LICENCE NUMBER

EXPIRY DATE

CERTIFICATE LOCATION

DEATH BENEFITS ATTACHED?

EDUCATIONAL CERTIFICATES

QUALIFICATION 1

INSTITUTION

YEAR COMPLETED

CERTIFICATE LOCATION

Your Miscellaneous Documents (cont.)

QUALIFICATION 2

INSTITUTION

YEAR COMPLETED

CERTIFICATE LOCATION

CITIZENSHIP & NATURALISATION

AUSTRALIAN CITIZENSHIP CERTIFICATE (LOCATION)

DATE GRANTED

COUNTRY OF ORIGIN

IMMIGRATION PAPERS (LOCATION)

OTHER CITIZENSHIP CERTIFICATE (LOCATION)

ADOPTION RECORDS

Adoption records can be sensitive. Note who should have access.

ADOPTION ORDER (LOCATION)

ORIGINAL BIRTH CERTIFICATE (LOCATION)

WHO MAY ACCESS THESE

OTHER RECORDS

HEALTH RECORDS (LOCATION)

AWARD / HONOUR 1 (ORG, YEAR, LOCATION)

Your Miscellaneous Documents (cont.)

AWARD / HONOUR 2 (ORG, YEAR, LOCATION)

VEHICLE REGISTRATION PAPERS (WHERE)

OTHER INSURANCE POLICY (TYPE / INSURER / LOCATION)

NOTES: ANYTHING ELSE ABOUT MISCELLANEOUS DOCUMENTS

Extra Space

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