
End of Life

Planning Checklist and Worksheet



Legal Services
Commission South Australia

It is difficult to talk about death and dying with loved ones. This booklet supports those facing the end of their life by providing:

- A Checklist with reminders of tasks to complete, and
- A Worksheet to collect the important information that an executor or family member may need after death.

The Checklist and Worksheet are not legal documents. They should, however, be completed confidentially and stored together with a Will in a secure and private location until needed.

Contents

Planning Checklist	1
Planning Worksheet	3
Personal Arrangements	3
Important Information	4
End of Life Preferences	5
Funeral Preferences	6
Details of Assets	7
Details of Liabilities	9
Logins and Passwords	10
Other Important Details	11
Notes	12

Planning Checklist

Prepare Legal Documents

- ☐ Will
- ☐ Advance Care Directive
- ☐ Enduring Power of Attorney
- ☐ Superannuation Binding Death Benefit Nominations
- ☐ Organ Donation Registration
- ☐ Body Donation Consent Form

Making Administration Easier

- ☐ Roll superannuation into a single account (consider life insurance implications)
- ☐ Close bank accounts that are not needed
- ☐ List the preferred distribution of personal items not addressed in a Will
- ☐ Make gifts of items prior to passing (consider tax implications)
- ☐ Write down how email, social media and online storage accounts are to be dealt with

List Important Information

- ☐ Login details and passwords
- ☐ Cryptocurrency access
- ☐ Organisation memberships
- ☐ Subscription services
- ☐ Utilities and bills (email/post)
- ☐ Assets and liabilities
- ☐ Location of safety deposit box, storage unit and safe
- ☐ Location of important documents
(Consider completing the Planning Worksheet on page 3)

Gather Important Documents

- ☐ Superannuation statements
- ☐ Life insurance policies
- ☐ Bank statements
- ☐ Asset purchase documents for capital gains tax purposes
- ☐ Leases / retirement home or residential care contracts
- ☐ Loan documents
- ☐ Birth certificate, marriage certificate, passport

Funeral Planning

- ☐ Funeral insurance or prepaid funeral plan
- ☐ Contact spiritual adviser
- ☐ Express preferences for burial or cremation, funeral service, charity in lieu of flowers
- ☐ Pallbearers
- ☐ Guests to be invited

End of Life Preferences

- ☐ Who should be present
- ☐ Location
- ☐ Other preferences (for example, music to be played)
- ☐ Persons to be notified of death

Personal Arrangements

- ☐ Care of children
- ☐ Care of pets
- ☐ Stored reproductive material (from IVF or fertility treatment)
- ☐ Letters to persons of significance / video legacies



Planning Worksheet

This Worksheet, when completed, provides important information an executor or family member may need following the death of a loved one. Some items may not apply and can be left blank. If more space is needed to answer a question, provide the details on a separate sheet and attach it to the Worksheet or use the Notes section on page 12.

Full Name

Previous Name(s)

Date of Birth

Personal Arrangements

Care of Children

Care of Pets

Stored Reproductive Material (from IVF or fertility treatment)

Important Information

Will location

Executor

.....

.....

Advance Care

Directive location

.....

Decision-maker(s)

Enduring Power of

Attorney location

.....

Attorney appointed

.....

Superannuation

☐ Yes ☐ No

Fund - Binding

Death Benefit

Nominations

.....

☐ Yes ☐ No

.....

Organ Donation Consent ☐ Yes ☐ No Registered ☐ Yes ☐ No

Body Donation Consent ☐ Yes ☐ No Registered ☐ Yes ☐ No

Funeral Insurance

and Policy Number

.....

End of Life Preferences

Preferred location

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Who should be present

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Other preferences

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Persons to be notified of death

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Funeral Preferences

Spiritual Advisor or
Funeral Celebrant
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☐ Burial ☐ Cremation ☐ Body Donation

Headstone / Ashes
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Type of Service

Charity in lieu of flowers ☐ Yes ☐ No

Charity
.....

Eulogy
.....

Pallbearers
.....
.....
.....
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Details of Assets

Real Estate - Properties

Address	Purchase Documents Located
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Bank Accounts

Bank or Credit Union	Account Numbers	Statements Located
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Details of Assets

Superannuation and Life Insurance

Fund	Member / Policy Number	Statements / Policy Located
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.....
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.....
.....

Vehicles / Boats / Trailers / Caravans

Vehicle	Registration Number	Registration Notice Located
.....
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.....

Other Assests (for example, shares)

Item	Description	Document Located
.....
.....
.....
.....
.....

Details of Liabilities

Mortgages and Loans

Bank or Lender	Account Number	Statments Located
.....
.....
.....

Credit Cards

Bank or Lender	Account Number	Statments Located
.....
.....
.....
.....

Other Liabilities and Debts

Bank or Lender	Account Number	Statments Located
.....
.....
.....
.....
.....
.....
.....

Logins and Passwords

Password Manager	L
	P
Email account	L
	P
Computer / laptop	P
Phone	P
Tablet / iPad	P
Facebook	L
	P
X (Twitter)	L
	P
Instagram	L
	P
Other Social Media	Service Provider
	L
	P
Cloud Storage	Service Provider
	L
	P
Streaming services (for example, Netflix)	Service Provider
	L
	P

Other Important Details

Safety Deposit Box

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Storage Unit

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Safe

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Memberships

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Subscription Services and Direct Debits

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Cryptocurrency

.....

Leases

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Retirement home or residential care contract

Birth
Certificate

Marriage
Certificate

Passport

Notes

[illegible]

For free legal advice regarding end of life planning, or any questions regarding the terminology used in this booklet, please call the Legal Helpline on 1300 366 424.

Further Information



Body Donation
Consent Form



Organ Donation
Registration



Advance Care
Directives



Power of Attorney
Brochure



Wills
Brochure

Disclaimer: If completed, this booklet will contain significant confidential personal information, including passwords, that could be used by another person to access accounts and information. The booklet should be completed personally and without the assistance of third parties, and be securely stored together with a Will until needed.

This booklet is made available as a public service for information purposes only and is not a substitute for legal advice.