

## My Estate to Do List

Below are a list of organisations which may need notification following a death. This will assist your family to finalise your estate. List the contact details and any reference numbers that maybe needed for your family's knowledge...

PROFESSIONALS		EMPLOYER	
☐ Lawyer:	Name:	☐ Employer 1:	Name:
	Ph:		Ph:
☐ Public Trust:	Location:	☐ Employer 2:	Name:
	Ph:		Ph:
☐ Accountant:	Firm:		
	Name:	HOME APPLIANCE & /	MEDICAL AID RENTALS:
	Phone:	□ 1:	Name:
☐ Executor of Will:	Name:		Ph:
	Ph:	<b>□ 2</b> :	Name:
☐ Doctor/GP:	Name:		Ph:
	Ph:		
☐ Dentist:	Name:	GOVERNMENT	
	Ph:	☐ IRD Department:	IRD:
☐ Chemist:	Name:	☐ Electoral Office:	#:
	Ph:	□ WINZ:	#:
$\square$ Specialist/Hospital:	Dr.:	☐ Council Rates:	
	Phone:	☐ Vehicle Register:	
FINANCE		SERVICES	
<u>Banks</u>		☐ Funeral Cover:	Name:
☐ Bank 1:	Acc #:	Ph:	Ref:
- Credit Card	Card #:	_	Amount: \$
- Loan/s	Ref #:	☐ Life Insurance Cover:	Name:
☐ Bank 2:	Acc #:	Ph:	Ref:
- Credit Card	Card #:		Amount: \$
- Loan/s	Ref #:	☐ Car Insurance:	Name:
☐ Financial Provider 1:	Name:	Ph:	Ref:
Dh. D		☐ Contents	Namo
Ph: Ro  ☐ Financial Provider 2:	ef:	Insurance:	Name:
Nume.		Ph:	Ref:
Ph: Ref:		☐ Health/Medical:	Name:

SERVICES CONT'D		INVESTMENTS:	
☐ Medic Alert	Name:	☐ Bonus Bonds:	Name:
Ph:	Ref:	Ph:	Ref:
UTILITY PROVIDERS:		☐ KiwiSaver:	Name:
☐ Phone Provider:	Name:	Ph:	Ref:
Ph:	Ref:	☐ Superannuation:	Name:
☐ Power Provider:	Name:	Ph:	Ref:
Ph:	Ref:	☐ Mortgage:	Name:
☐ Gas Provider:	Name:	Ph:	Ref:
Ph:	Ref:		
		CHURCH/RELIGIOUS ORGANISATIONS	
CLUBS & ASSOCIATIONS			Name:
Clubs:			Ph:
☐ RSA/Cozzy Club/Bowls	Name:		Name:
	Ph:		Ph:
	Name:		
	Ph:		
Associations:			
☐ Registration Board	Name:		
(Nurses, Teachers etc.)			
(Nurses, Teachers etc.)  Ph:	Ref:		
(Nurses, Teachers etc.)			