



Personal Information Guide

Name:

.....

THIS DOCUMENT IS IMPORTANT
It should be kept in a safe place
known to your Family or Executor

With compliments

Guardian Plan
A prepaid funeral plan

“TO MY FAMILY”

“I have completed this guide as a way of relieving you of the sole responsibility and decision making when the time comes.”

Signed: _____ Dated: _____

PERSONAL INFORMATION GUIDE

This guide is made available to enable you to record information and arrangements in advance that will assist your family and funeral director to ensure everything is conducted in accordance with your wishes.

Should you require assistance in completing it or require further copies of this guide for other family members, please call Guardian Plan Toll Free 1800 151 158.

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Personal Information

Family name	First (Given) names	
Address	Postcode	
Date of birth	<input type="checkbox"/> Female	<input type="checkbox"/> Male
Place of birth (Town/City/State/Country)		
If born overseas, year arrived in Australia		
Occupation during working life		

Name and Address of Person who I would like to make any Arrangements

(For instance, contacting the funeral director, e.g. executor, solicitor, family member)

Name	Telephone
Address	Postcode

Funeral Director

(Funeral director you would like to conduct your service and register the death)

Name	Telephone
Address	Postcode

Next of Kin

(This information is needed when the death is registered.)

Name	Telephone
Address	Postcode

Executor of my Will

(Executor will need certain financial information when applying for grant of probate.)

Name	Telephone
Address	Postcode

Copy of my Will

Date of Will
Deposited with (Name and Address)

Solicitor

Name	Telephone
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Family Doctor

Name _____ Telephone _____
Address _____ Postcode _____

Personal Documents

Birth Certificate _____ Location _____
Marriage Certificate _____ Location _____
Medicare Card _____ Card number _____ (to be returned to Medicare office)
Centrelink Pension _____ Number _____ Type of pension _____
Veterans' Affairs _____ Number _____
Passport _____ Name shown on passport _____
_____ Passport number _____ Expiry date _____
(Passport should be returned to passport office in your area, details at local Post Office)
Driver Licence _____ Number _____ State of issue _____

Club or Association memberships (Should be returned to appropriate organisation.
It may be that a claim can be made for unexpired memberships or mortality fund benefit.)

The following Family, Marriage and Children Details are needed for death registration

Family Details

Father's surname _____ First names _____
Usual occupation _____
Mother's maiden surname _____ First names _____
Usual occupation _____
Spouse surname _____ First names _____

Marriage Details (Please tick appropriate box(es))

Married Divorced Separated Widowed Never married De facto

Details of Marriage(s)

First marriage (Place/City/Town/Country) _____
Age at date of marriage _____ Name of spouse (at date of marriage) _____
Second marriage (if applicable) (Place/City/Town/Country) _____
Age at date of marriage _____ Name of spouse (at date of marriage) _____

Children's Details

(List all children in order of date of birth, including legally adopted, deceased (D), still born (SB), or if no children write "none".)

Full name	Date of birth	<input type="checkbox"/> Male <input type="checkbox"/> Female
Full name	Date of birth	<input type="checkbox"/> Male <input type="checkbox"/> Female
Full name	Date of birth	<input type="checkbox"/> Male <input type="checkbox"/> Female
Full name	Date of birth	<input type="checkbox"/> Male <input type="checkbox"/> Female
Full name	Date of birth	<input type="checkbox"/> Male <input type="checkbox"/> Female
Full name	Date of birth	<input type="checkbox"/> Male <input type="checkbox"/> Female

Financial Information (Information below may be required by the executor of your Will.)

Bank account details Bank name _____

Account numbers _____ Bank branch _____

Location of documents, books, statements _____

Building society/Financial institution Building society/Financial institution name _____

Account numbers _____

Address _____

Income tax records Tax File Number _____ Location of records _____

Deeds of property Property address(es) _____

Location of records _____

Mortgage details Location of records _____

Lender _____ Reference number _____

Address of lender _____

Life insurance policies

Location of records _____

Superannuation

Details _____

Stocks and shares

Location of records _____

Safe deposit box Box location/number _____

Location of keys _____

Accountant Name _____ Telephone _____

Address _____ Postcode _____

Car details

Registration number and state

Registration document location

Location of purchase receipt/H.P. details

Military Information (If applicable)

Branch of service

Service serial number

Date entered service

Place

Date of discharge

Place

Grade, rank or rating

Wars/Conflicts served

Additional Information**Historical information**

Every individual is deserving of a meaningful obituary written in their memory. It is here that you may list those achievements and accomplishments that have been of pride to you and your family that are not mentioned elsewhere in your "Personal Information Guide".

Education

Name of primary school

Date attended from

to

Name of secondary school

Date attended from

to

Name of tertiary institution

Date attended from

to

Qualifications attained

Societies/Clubs Memberships and positions held (include dates)

Other (including civic or public office held)

Special achievements (details of any special achievements or recognitions)

Medical History

This information is very important for your spouse, children and grandchildren. It is also suggested that you keep an updated copy of your medical records for your family, as doctors often ask for it.

FUNERAL SERVICE INSTRUCTIONS

(If insufficient space - use page 8)

Funeral Director: _____

Do you have a prepaid funeral (e.g. Guardian Plan) Yes No

Do you wish to be: Buried Cremated following a Funeral Service held at the Funeral Director's Chapel at: _____ or at _____ Church in _____ I *would/would not* like a service to be held at the _____ cemetery/crematorium.

Celebrant/Clergyman: _____ Veteran Service by: _____

Eulogy by: _____ Donations to: _____

Floral Preference (type, colour, details): _____

Newspaper Notices: Death Notice: Yes No Funeral Notice: Yes No

Music Selections: _____

Do you want a 'Viewing' prior to the Funeral Service? Yes No

Coffin/Casket be open for Viewing for: Family only Those wishing to pay respects

Type of Coffin/Casket desired: Coffin Casket

Wood Metal Australian Flag Covered

Clothing: Yes No Jewellery on: Yes No Glasses on: Yes No

Special verses / reading etc: _____

Special Ceremonies: _____ DVD presentation required: Yes No

Cultural Traditions: _____ Catering required: Yes No

PALLBEARERS to carry Coffin/Casket:

Name	Address	Telephone
------	---------	-----------

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

MEMORIALISATION

Have you considered the benefits of Memorialisation?

Our experience tells us the three main reasons people choose Memorialisation are:

- Commemorates a life that was lived
- A restful place for family and friends to reflect and celebrate special times and memories
- A final resting place that can be individualised to meet religious and cultural beliefs

MEMORIALISATION INFORMATION

Do you have an existing family connection with a Cemetery/Crematorium?

If Yes - details _____

Name and Address of Cemetery/Crematorium preferred: _____

_____ Telephone No: _____

Do you now own Cemetery/Crematorium property eg a grave? Yes No

If Yes, in whose name is the property registered? _____

If Yes, location of Deed/Receipt: _____ (Do not keep in safety deposit box)

If Yes, location of property within Cemetery/Crematorium: _____

I OWN/PREFER (mark one):

Burial: Grave Crypt Family Estate

Cremation: Wall Niche Rose Garden Family Estate

Should the Coffin/Casket be Placed into a Protective Burial Vault? Yes No

Do You want the Family to be Present when the Coffin/Casket is Placed into the Grave or Crypt?

Yes No

Type of Memorial Desired: Family Double Single

Additional Remarks: _____

THE IMPORTANCE OF A WILL

If you die without a will, the Courts determine who will administer your estate, handle financial matters and act as guardian for your minor children. With a will, you can choose.

In some instances, joint ownership of property may not be a good substitute for a carefully drafted will. As a result of a common accident both you and your spouse may die before the survivor has had an opportunity to execute a proper will and the property will pass according to state law.

The law is very exacting in its requirements with respect to the publication, signing and witnessing of wills. It is recommended that this matter be handled by a competent solicitor. Homemade wills often do not stand up in court.

You should review your will every few years, particularly if you have moved or your family situation has changed since you last executed a will. State laws vary as to formal requirements and as to the rights of children and grandchildren born after a will was executed.

When you realise how much is at stake ...the well-being of your entire family and the protection of your property ...you will find that the solicitor's fee for drafting your will and planning your estate is a worthwhile investment.

In the same way that a Will instructs your executor to carry out those wishes, a Prepaid Funeral Plan sets out your wishes regarding your Funeral for your next of kin. It provides emotional and financial peace of mind for you and your family.

Our experience suggests that, like drawing up the provisions of a Will, the best time to make these plans is well beforehand, without hurry or stress. It needs time and thought.

WHAT IS GUARDIAN PLAN?

Guardian Plan is a prepaid funeral plan which enables you to prepay selected funeral services for tomorrow's funeral at today's price.

By planning ahead you can ensure 'peace of mind' for yourself and those you care for.

You may choose to pay the full price now or by instalments, secure in the knowledge that Guardian Plan will ensure your funeral is professionally carried out.

Guardian Plan offers you a no charge, obligation free consultation with a representative to explain options available and to answer your questions.

WHY SHOULD YOU PREPAY FUNERAL EXPENSES?

- It allows you to consider alternatives and make decisions concerning your funeral in your own time.
- You will feel better knowing your affairs are in order and your wishes will be carried out as planned.
- You will have peace of mind knowing that once your funeral details have been documented in a contract, the uncertainty concerning your final wishes will be lifted from the shoulders of your family and friends.
- You save by paying for tomorrow's funeral at today's price. You are protected against inflation and price increases because no further charges are made on the items selected by you for your funeral plan contract – ever.
- You relieve your family from the financial burden of your funeral.
- Your pension and all other benefits are not adversely affected.
- If you move interstate your plan may be able to be transferred to another of Guardian Plan's accredited funeral homes or providers at no extra charge.
- You are able to cover the added expense of repatriation to your home town should your death occur while you are away from home by taking out a Travel Protection Plan.

By planning ahead with Guardian Plan you can get on with enjoying your life.

WHY PREPAY WITH GUARDIAN PLAN?

The Guardian Plan selects funeral directors and consultants to act as representatives based on their integrity, reliability, empathy and above all, experience.

Guardian Plan is able to ensure the services provided in your plan are available through more than 150 accredited funeral homes in Australia.

WHAT COSTS CAN BE COVERED BY GUARDIAN PLAN?

- The transfer of the deceased during business hours from the place of death within a 70 kilometre radius of the accredited (nominated) funeral home.
- Professional consultation at the time of death to explain your wishes and involve those left behind in arranging additional services such as organising of newspaper notices and ordering flowers if required.
- Interim care for the deceased prior to the funeral.
- Supply of coffin or casket.
- Presentation for viewing, prayers and professional attendance at the funeral, chapel, church, crematorium or graveside.
- Completion of documents necessary to enable registration of death to facilitate the burial or cremation.
- Provision of necessary vehicles.
- Instructions to the crematorium or cemetery.

Whilst planning the funeral details with your Guardian Plan consultant, you are encouraged to clearly record your choice of cremation or burial.

Should you wish to prepurchase a right of burial (including burial plots, crypts and related monument works) or cremation, your Guardian Plan consultant will assist you to make contact directly with the appropriate cemetery or crematorium.

ARE SOME THINGS BEST LEFT UNTIL LATER?

Having completed your Guardian Plan prepaid funeral arrangement you know you have assisted those who will be left behind ... now you can get on with enjoying life.

It is important to leave some tasks to be completed at the time of the funeral. There is considerable evidence to suggest that being involved in the actual funeral arrangement helps some people accept the reality of death, which in turn helps the grieving process to begin. Allowing your family, with the guidance and assistance of a funeral director, to organise newspaper notices, flowers, clergy, etc gives them a meaningful role in planning your funeral within the context of your wishes.

WHAT DOES A FUNERAL COST?

The actual cost depends very much upon your particular needs and wishes. A Guardian Plan consultant will be happy to meet with you to discuss your options and help you clearly set down your wishes.

GST is applicable to prepaid funerals

CAN YOU PAY BY INSTALMENTS?

Once the price of your Guardian Plan is agreed, you can either:

- pay in full; or
- pay by regular monthly instalments

By authorising a direct debit against your bank account you do not have to worry about remembering to make the payments – it happens automatically.

Should you elect to pay by instalment, an initial contribution up front, will be required. This will be followed up by monthly instalments over a period to suit you – up to 36 months.

Once all instalments have been received on time, the previously agreed Guardian Plan price is fixed forever.

If the Guardian Plan is required before the instalments are fully paid, then provided your payments are up-to-date, Guardian Plan may on request, ensure that all instalments are put towards the agreed cost of the actual funeral with the accredited Guardian Plan funeral home. Any shortfall will be payable by the family to the funeral home at that time.

WHAT HAPPENS TO THE MONEY I PAY?

Upon acceptance of your application, the funds are invested with the Over Fifty Guardian Friendly Society Limited (Society) on your behalf. The Society will confirm your membership and initial investment. Although you have assigned the benefit of your investment to Guardian Plan, the funds cannot be accessed by Guardian Plan until the contracted service has been provided.

You should read closely the disclosure document of the Society. It has important information about your rights, the Society and your membership. (You should not pay any money until you have read the Society's disclosure document.)

Once paid in full, you will receive the prepaid services when required in accordance with the contract arranged with Guardian Plan.

WHO MANAGES THE FUNDS?

The Society appoints investment managers with appropriate expertise, experience and resources to manage the authorised investments of the funds.

The investment manager selects and manages investments for the funds in accordance with guidelines established by the Society.

It is Guardian Plan which bears the investment risk associated with your funds, not you.

TRAVEL PROTECTION PLAN*

A Travel Protection Plan specifically provides for those additional funeral related costs which are incurred within Australia when death occurs whilst travelling away from the normal place of residence. Guardian Plan arranges your repatriation from anywhere in Australia to your nominated funeral director so your funeral can take place where you intended.

*Subject to terms & conditions contained in the Guardian Plan contract.

COOLING OFF PERIOD

You are entitled to cancel the Guardian Plan within 30 days or such other period as required by legislation, of receiving the Society's Policy Confirmation Letter:

After the Cooling Off Period you cannot cancel or reduce the services written in the plan.

ACCREDITED FUNERAL DIRECTORS

The Guardian Plan has relationships throughout Australia with various accredited funeral homes. A list of these accredited funeral homes can be obtained by contacting Guardian Plan.

Call Toll Free: **1800 151 158**

or visit

www.guardianplan.com.au

Memorial Guardian Plan Pty Limited

ABN 82 066 115 115



Providing
peace of mind
for you and your
family and
protection
against inflation.

Guardian Plan

A prepaid funeral plan

For details of your nearest Guardian Plan Accredited Provider
call Toll Free: 1800 151 158
or visit www.guardianplan.com.au