



GUARDIAN
PLAN

1800 220 888

FUNERAL PLANNER

A plan today means peace for tomorrow

Proudly part of Australia's most trusted provider of funeral, cemetery, crematoria and related services.

*This document is important, keep it in a safe place where
your family and executor can find it.*

Be the author of your own story

Planning ahead means celebrating your life, your way - and saying goodbye on your own terms. Creating the time to look back on your experiences and the moments that tell your story, and designing a farewell that reflects you.

Planning ahead also makes things a little bit easier for those you leave behind. With this guide, you can let your family know your wishes and record the Important Information they will need.

Our specialists are ready to answer any questions you might have as you complete your plan.

Call us on **1800 220 888**.

Full name

Address

Date of birth

Place of birth

Year arrived in Australia, if born overseas

Contents

Let's start with the funeral	6
Memorialisation	8
Death registration	9
People to contact	10
Important information	11
Guardian Plan	12

Let's start with the funeral

Where would you like your funeral to be held?

Who should speak at the funeral?

Is there a clergy person or celebrant you would like to conduct the funeral?

What music would you like played?

Are there any verses or readings you would like read?

Are there any photos or films you would like shown? Where can they be found?

Are there any rituals or cultural practices you would like observed?

What is your favourite pastime or hobby? Would you like your funeral to be themed for this hobby? For example, with memorabilia or a LifeArt coffin (lifeart.com.au)?

Which flowers or colours do you like?

What food and drink would you like served afterwards?

Are you a returned Service Man or Woman?

Would you like a newspaper announcement of your death and/or funeral?
Where should it be placed?

Who would you like to take care of the finer details of your funeral when the time comes?

Memorialisation

Would you prefer to be buried or cremated?

Do you have any preferences for the style of coffin or casket?

Do you already know what clothes or jewellery you'd like to be dressed in?

Where would you like to be buried or have your ashes placed?

Burial:

Grave Crypt Family Estate

Cremation:

Wall Niche Rose Garden Family Estate Scattered

Do you already own a burial plot in a cemetery or a place for your ashes in a memorial park? Yes No

If yes, at which cemetery or memorial park?

If yes, what is the location of the property within the cemetery/crematorium?

If yes, in whose name is the property registered?

What would you like your headstone or plaque to say?

Death Registration

This information is required to register a death.

Next of kin

Family Name	Given Name/s
Address	
Phone	Email
Father's name	Usual occupation
Mother's name	Usual occupation
Partner's name	Usual occupation

Marriage details

Married
 Divorced
 Separated
 Widowed
 Never married
 De facto

First marriage

Location	Age at marriage
Name of your partner	

Second marriage

Location	Age at marriage
Name of your partner	

Children

Name	Date of birth
<input type="checkbox"/> Female <input type="checkbox"/> Male	
Phone	Email
Name	Date of birth
<input type="checkbox"/> Female <input type="checkbox"/> Male	
Phone	Email
Name	Date of birth
<input type="checkbox"/> Female <input type="checkbox"/> Male	
Phone	Email

People To Contact

Executor of my will

Family Name	Given Name/s
Address	
Phone	Email
Where is your will?	

Doctor's Name

Phone

Solicitor's Name

Phone Email

Accountant's Name

Phone Email

People to be notified

Name

Relationship

Phone Email

Name

Relationship

Phone Email

Name

Relationship

Phone Email

Name

Relationship

Phone Email

Important Information

To make things easier for your family, let them know where to find the following information and documents.

- Birth certificate**

- Passport**

- Driver's license**

- Marriage certificate**

- Divorce certificate**

- Bank account details**
Account numbers, branch

- Tax records**
Tax file number, location of records

- Superannuation**
Fund details

- Deeds of property**
Property addresses, location of records and include deeds/receipt for burial/memorial

- Mortgage**
Lender reference number and contact details, location of records

- Stocks and shares**
Location of records

- Safe deposit box**

- Centrelink**
Pension number / type of pension

- Life insurance**
Insurer contact details, policy number

- Car**
Location of purchase and registration records

- Veterans' affairs**
Number

- Military service**
Details

Guardian Plan

It's comforting to know that some things can be planned ahead of time.

That's where our prepaid funeral product, Guardian Plan can help. Guardian Plan empowers you to take ownership of what matters to you, and reduce the burden of family decision-making and financial arrangements when it comes time to say goodbye.

Guardian Plan allows you to pay today's prices for chosen funeral services in advance. With your Guardian Plan, peace of mind moves with you. Your selected funeral services are price-protected from day one, and if you relocate, your plan can be transferred to a participating provider within a 70km radius of your new local area.* With over 250 trusted locations across Australia, it's easy to stay covered wherever life takes you.

Guardian Plan offers flexible payment plans of up to three years[^] and no hidden costs.

Guardian Plan is generally exempt from the asset tests for age pension purposes. However, pension eligibility depends on your individual circumstances. Please refer to Services Australia or seek independent advice.

*Conditions and fees may apply. [^]Custom preplanned funerals can be paid in interest-free instalments or upfront. A deposit of 30% is required and balance can be paid by monthly payments over a period up to 3 years. Monthly payment instalments are not available for packages. Therefore, full payment is required at the time of arrangement.





Guardian Plan is a prepaid funeral plan, where your funds are invested in a funeral bond by the Over Fifty Guardian Friendly Society Limited ABN 81 087 649 063 AFSL 524353. After the cooling off period, funds cannot be withdrawn and can only be used to pay for the funeral services in your Guardian Plan.

We do not offer financial advice. Guardian Plan is a financial product and may not be suitable for everyone. Before making a decision, consider the Product Disclosure Statement (PDS) on our website guardianplan.com.au and consider whether this option suits your needs.

For more information, visit guardianplan.com.au or call us on **1800 220 888**.



Guardian Plan is part of Australia's most trusted provider of funeral, cemetery, crematoria and related services.



ANN WILSON
FUNERALS

ARCHER & SONS
FUNERAL SERVICE



Blackwell
Funerals



GUARDIAN
PLAN

Call us on **1800 220 888** or visit guardianplan.com.au