



Flourishing Figures
incorporating
Mick Mahoney & Associates
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Estate Planning Checklist

- + Will – date made and where it is stored
- + Power of Attorney – date made and where it is stored
- + Medical Decision Maker – date made and where it is stored
- + Life & TPD insurance
- + Superannuation Fund details and Binding Death Benefit Nomination (Lapsing?)
- + List of personal Assets & Liabilities (see next page for ideas)
- + Bank account access
- + Accountant's details
- + Lawyer's details
- + Financial Planner's details
- + Digital passwords and social media access
- + List of account details (i.e. utilities, internet, mobile, private health insurance)

In Business?

- + Key Person insurance
- + Business Expenses insurance
- + Corporate Power of Attorney – date made and where it is stored
- + Trust – provision made for the change of the Appointer
- + Disaster Plan – what should happen in the short and long term

*This is not an exhaustive list. Please seek professional advice, for your unique situation.
Our Resources webpage lists some contacts that we recommend & trust.*

Liability limited by a scheme approved under Professional Standards Legislation
Chartered Accountant & Registered Tax Agent

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List of personal Assets & Liabilities

Assets

\$

Bank Accounts
Home
Investments
Superannuation

Liabilities

\$

Mortgage
Credit Card
Investment Loans

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