

Be prepared
for life's changes

Personal Profile



Our Vision

To be Queensland's best provider of trustee and administration services.

Our Mission

To deliver a full range of professional, accessible and reliable trustee, financial and related services in a supportive, compassionate and ethical manner.

About The Public Trustee

We deliver a range of specialist services to the Queensland community including:

- Enduring Powers of Attorney
- Deceased Estate Administration
- free Will making
- property sales
- financial administration for people with incapacity.



It's optional you complete this booklet, as it's not a legally binding document and it does not replace a valid Will – so make sure your Will is up to date.

By completing this booklet you'll be assisting your family, friends, guardians or attorneys to either administer your Deceased Estate or your affairs if you are unable to do so for yourself.

Remember to keep this booklet in a safe place; ideally with your copy of your Will.

First Name: _____

Surname: _____

Address: _____

Suburb: _____

State: _____ Postcode: _____

Date of birth: _____

Place of birth: _____

Tax File Number: _____

Occupation: _____

Spouse/Partner

First name: _____

Surname: _____

Maiden name (if applicable): _____

Date of birth: _____

Place of birth: _____

Date of death (if applicable): _____

Date of marriage: _____

Place of marriage: _____

Parents

Fathers name: _____

Date of birth: _____

Mothers maiden name: _____

Date of birth: _____

Nationality and Religion

By birth: _____

By naturalisation: _____

Resident in Australia since: _____

Religion: _____

Local Church: _____

Children

1. Full name: _____

Date of birth: _____

Place of birth: _____

Date of death *(if applicable)*: _____

2. Full name: _____

Date of birth: _____

Place of birth: _____

Date of death *(if applicable)*: _____

3. Full name: _____

Date of birth: _____

Place of birth: _____

Date of death *(if applicable)*: _____

General information

Date of last Will

Name(s) and address(es) of Executor(s):

Prepared by: _____

Location: _____

Date of last Enduring Power of Attorney

Name(s) and address(es) of Attorney(s):

Prepared by: _____

Location: _____



Date of last Advanced Health Directive

Doctor witnessing Advanced Health Directive:

Address and phone number:

Regular Doctor

Address and phone number:

Assets

Home

Owned solely or jointly by:

Mortgaged to: _____

List of any insurance policies on the property

Investment properties

Owned solely or jointly by:

List of any insurance policies on the property

Bank Accounts

Name of Bank: _____

Account Name: _____

Account Type: _____

Name of Bank: _____

Account Name: _____

Account Type: _____

Name of Bank: _____

Account Name: _____

Account Type: _____

Car insurance

Insurance details: _____

Location: _____



Superannuation

Name and addresses of funds:

Life Insurance

Name and address of company:

Shares and managed funds

Name of broker/financial adviser

Records of shares



Pensions

Pension received from:

Who to notify in the event of an accident or death

Name: _____

Address: _____

Telephone: _____

Mobile: _____

Relationship to you: _____



Name: _____

Address: _____

Telephone: _____

Mobile: _____

Relationship to you: _____

It's important to remember a Will is a living document that accompanies you on your life's journey. Important life stages for updating your Will are:

- marriage
- separation or divorce
- entering a de facto relationship
- birth of a child or grandchild
- a change to your assets or financial circumstances
- death of a spouse or partner
- a change to a beneficiary (a beneficiary is someone who you would like to have a share of your Estate)
- retirement
- natural disasters.

For more information about Wills

Queensland Wills Week



Visit: www.willsweek.pt.qld.gov.au for real life stories and common myths about Will making and access to news and events.

twitter  **@PTrusteeQLD**

You can follow us on Twitter to receive the latest information about our services, news and events. Visit www.twitter.com



Protecting your **privacy**

The Public Trustee collects and manages personal information in the course of performing its activities, functions and duties in accordance with the *Public Trustee Act 1978* (QLD). We respect the privacy of the personal information held by us. The way in which The Public Trustee manages personal information is governed by the *Information Privacy Act 2009* (QLD).

This means there are restrictions on how we can use, and when we can disclose, your personal information. When you supply us with your personal information as part of providing us with feedback or lodging a complaint, we will generally use this information only to assist us to address your concerns.

We generally do not disclose your personal information outside of The Public Trustee unless we are required to do so by law or unless you have given us your consent to such disclosure. If you would like to read our Privacy Statement, please visit our website at www.pt.qld.gov.au

Contact Us

Your nearest Public Trustee Office

Brisbane

07 3213 9288

Bundaberg

07 4181 0800

Brendale

07 3142 1900

Cairns

07 4040 7300

Gladstone

07 4962 1100

Ipswich

07 3432 6611

Mackay

07 4969 4600

Maryborough

07 4183 0900

Mount Isa

07 4764 0500

Nambour

07 5444 9400

Redcliffe

07 3817 9100

Rockhampton

07 4999 3600

Southport

07 5588 5333

Sunshine Coast

07 5314 1800

Toowoomba

07 4631 8100

Townsville

07 4753 0111

We also offer a range of outreach services in other areas of Queensland. Phone us to find out about your nearest service centre.

1300 360 044

 @PTrusteeQLD

www.pt.qld.gov.au

**Queensland
Wills
Week**

