



# Seniors Personal Record Book

KEEP ALL YOUR IMPORTANT INFORMATION  
TOGETHER IN ONE PLACE

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## **Tips**

*Not all of the sections in this booklet will be relevant to you. Just complete what applies to you and your circumstances.*

*To fill in your booklet on your computer, you'll need to have form-filling software such as Adobe's Acrobat Reader, available to download free from Adobe.*

**[DOWNLOAD FREE FROM ADOBE](#)**

# About this booklet

This Seniors Personal Record Book is designed to help older Australians – and the people who care for them – keep their personal affairs well-managed by collating and simplifying their record-keeping information.

Managing your interests and day-to-day matters is more complex than it used to be. Modern life involves a lot of administration – household, financial, medical, lifestyle – completed, increasingly, online rather than in person.

As a result, you probably now have a range of accounts, memberships, passwords, family and friendship groups, advisers, interests and commitments. It's hard to keep track of who, what, how and where everything is!

This can make things difficult when someone passes away or becomes incapacitated. Their family and friends may not have all the necessary details for sorting everything out or contacting everyone.

The Seniors Personal Record Book aims to overcome these challenges by providing you with one place to capture everything you need to remember – and everything your family, friends or support services may need to know about you.

## USING YOUR BOOK

Fill in this booklet as completely as you can, either with PDF software on a computer or with a pen on a printed copy. It's likely that not all of the information it asks about will apply to you; that's fine! Just skip any sections that don't apply. (You might like to cross those sections out or write 'not applicable'.) And if you need more space to write additional information, use the Notes section on page 20.

**For your own security online, we strongly recommend that you do not record passwords in your Seniors Personal Record Book. It is also important that all your estate planning documents are kept up to date and recorded in your Seniors Personal Record Book.**

Once you've completed your booklet, record the date in the space at the bottom of this page. We recommend you then **store the booklet safely in a secure but accessible place** to protect your information. Finally, tell at least two other people you trust where the booklet is so they can find it if they need to help you.

## ABOUT COMPASS

Compass ([www.compass.info](http://www.compass.info)), a national website navigating elder abuse in Australia, is an online resource for older Australians and their families, friends and support services. It was created by Elder Abuse Action Australia ([eaaa.org.au](http://eaaa.org.au)), with funding from the Australian Government's Attorney-General's Department. Created in response to Priority Area 2 of the [National Plan to Respond to the Abuse of Older Australians 2019–2023](#), Compass aims to raise awareness of the growing social issue of elder abuse and to simplify the process of connecting people to services and information.

*This booklet was completed on:*

# About me

## PERSONAL DETAILS

Full name

Any previous name(s)

Address

Email

Home phone

Mobile

Date of birth

Place of birth

## NATIONALITY

By birth

By citizenship

Date of citizenship conferral

Year of arrival in Australia

## RELIGION

Religion

Place of worship

## MEDICAL INFORMATION

Medical conditions, allergies or therapies

Current medications and where they're kept

Medicare number

# Important people

## EMERGENCY CONTACTS

1. Name

Relationship

Address

Phone

2. Name

Relationship

Address

Phone



### **Tips**

*Your emergency contacts should be the family members or friends that you would want contacted immediately if you fell ill or had an accident.*

## MY SPOUSE OR PARTNER

Relationship status	Single	Married	De facto
	Widowed	Divorced	Separated

Spouse or partner's name

Any previous names

Address (if different from yours)

Date of birth

Place of birth

Date of marriage

Place of marriage

Date of divorce or separation

Date of death

If you have a former spouse or partner who should also be notified of your passing or incapacity, write their details here.

Name

Address (if different from yours)

Phone



### Tips

*If you need more space for some of your information, use the Notes page at the back of the booklet.*

*If you can't complete the booklet all at once because you need to look up some information, that's fine! Take your time to get it right.*

## MY CHILDREN

1. Name

Address

Phone

2. Name

Address

Phone

3. Name

Address

Phone

4. Name

Address

Phone

5. Name

Address

Phone



## OTHER FAMILY MEMBERS

1. Name

Relationship

Address

Phone

2. Name

Relationship

Address

Phone

## CLOSE FRIENDS

1. Name

Address

Phone

2. Name

Address

Phone



# Other contacts

## EMPLOYER

My occupation

Employer

Address

Contact person

Phone

## PROFESSIONAL SERVICES

### *DOCTOR (GP)*

Name of practice

Doctor's name

Phone

### *ACCOUNTANT*

Name of practice

Accountant's name

Phone

### *FINANCIAL ADVISER*

Name of practice

Adviser's name

Phone

### *SOLICITOR*

Name of practice

Solicitor's name

Phone

### *LANDLORD OR REAL ESTATE AGENT*

Name of agency

Contact person or landlord

Phone

**Compass.info**

**AGED CARE OR HOME HELP SERVICE**

Name of service

Contact person

Phone

**OTHER SERVICES**

Name of service

Contact person

Phone



## MEMBERSHIPS OF ORGANISATIONS

Organisation name

Contact person

Phone or email

Organisation name

Contact person

Phone or email

Organisation name

Contact person

Phone or email



### Tips

*'Organisations' means things like clubs, committees, unions, churches, cultural groups, classes or hobby groups.*



# Decisions I've made

## ENDURING POWER OF ATTORNEY

Have you made an enduring power of attorney? Yes                      No

Date signed

Attorney's name

Relationship

Address

Phone

## WILL

Do you have a current will? Yes                      No

Date signed

Executor's name(s)

Relationship

Address(es)

Phone



### Tips

An **enduring power of attorney** is a legal document that enables a person to make sure their financial decisions (and in some states and territories, personal/lifestyle decisions) will be looked after if they become unable to do it themselves. Find out more on [Compass](https://compass.info) at [compass.info](https://compass.info).

## OTHER DECISION-MAKING DOCUMENTS

Have you made any other record of your preferences and wishes for personal, medical, financial or any other type of decisions?    Yes                      No

If Yes, write here what documents you have made.

## FUNERAL WISHES

Have you prepaid and/or made any funeral arrangements?    Yes                      No

Name of funeral company

Address

Phone

Service to be held at:    a church                      funeral parlour                      home                      other

Funeral service to be given by:

Details of what you'd like

Would you like to have:    flowers                      no flowers

Donations in lieu of flowers to:

Do you have a preference for:    burial                      cremation

Preferred resting place



### Tips

*Making decisions in advance to maintain your independence, wellbeing and security in your later years is called 'future planning'.*

*[Read more about future planning on Compass at \[Compass.info\]\(#\).](#)*

## ORGAN OR BODY DONATION

Have you registered as an organ donor? Yes No

Who did you register with?

Have you decided to donate your body to science or education? Yes No

Who did you contact?

## SPECIAL REQUESTS

Write down any other particular wishes or decisions you'd like family or friends to take care of for you.



### *Tips*

*To find out about registering to be an organ donor, visit the Australian Government's [DonateLife website](https://donatelife.gov.au) (donatelife.gov.au).*

*You can learn more about donating your body to science or education by contacting a university, hospital or medical research facility near you.*

# My estate

To protect your information, only record identification numbers (such as your tax file number, membership numbers and Centrelink number) in this section **if you have a secure place to store your booklet.**

## MAIN ASSETS

### **RESIDENTIAL HOME**

Address

Are you a:    sole owner                                    joint tenant                                    or tenant in common

Mortgaged to

### **ANY OTHER PROPERTY**

Address

Are you a:    sole owner                                    joint tenant                                    or tenant in common

Mortgaged to

### **VEHICLES**

Details

Loans owing to

### **SIGNIFICANT POSSESSIONS**

Details

Instructions regarding these

## FINANCES

Only record your financial information if you have a secure place to store your completed booklet.

Tax file number

### ***BANK/CREDIT UNION/BUILDING SOCIETY ACCOUNTS***

1. Name of institution

BSB number

Account name

2. Name of institution

BSB number

Account name

3. Name of institution

BSB number

Account name





### ***SUPERANNUATION***

Only record your member numbers if you have a secure place to store your completed booklet.

1. Name of fund

Address

Member number

2. Name of fund

Address

Member number

### ***INVESTMENTS***

Only record your account number if you have a secure place to store your completed booklet.

Fund, company or organisation

Contact person

Account, customer or reference number

### ***PENSIONS***

Only record your pension numbers if you have a secure place to store your completed booklet.

Centrelink number

Veterans Affairs pension number

Military service number

Overseas pension details

### ***LOANS AND LIABILITIES***

1. Name of creditor

Address

Phone

Loan or customer reference number

2. Name of creditor

Address

Phone

Loan or customer reference number

## INSURANCE POLICIES

### ***LIFE OR DISABILITY INSURANCE***

Name of insurance company

Address

Phone

### ***HEALTH INSURANCE***

Name of private health insurance provider

Address

Phone

Member or policy number

### ***HOME AND CONTENTS INSURANCE***

Address of property

Name of insurance company

Address

Phone

Policy number



### ***Tips***

A **digital asset** (see next page) is any kind of electronic record or file that is stored online, such as your email, social media, online shopping accounts, movie or music streaming sites, photo libraries, cryptocurrency, ebooks, and even loyalty points like FlyBuys. A list that you make of these assets is called a digital inventory.

Find out more about planning for your digital legacy on [Compass.info](https://compass.info).

# Location of important documents

Birth certificate

Marriage certificate

Passport

Cheque book

Bank statements

Securities, share  
certificates, bonds,  
etc

Safe custody packet  
or safety deposit box

Superannuation documents

Will

Enduring power of attorney

Prepaid cemetery or cremation deed

Deed for your home

Deeds for other real estate

Military service record and discharge certificate

Pensioner card (Centrelink, DVA)

Any other  
documents  
(specify)

Digital assets inventory

Make sure the location of your inventory is secure if you have included passwords or other access information in your list.

# Notes



## Tips

*Safe custody is a secure storage service sometimes offered by banks and law firms to hold important documents, like wills, house deeds and powers of attorney, in one packet on their premises.*





**compass** an EAAA project  
GUIDING ACTION ON ELDER ABUSE

Made for all Australians regardless of nationality, culture or language,  
Compass is an inclusive website navigating elder abuse.



Australian Government  
Attorney-General's Department



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