



PERSONAL AND FAMILY PROFILE BOOKLET





“Investing in a funeral plan can help relieve your family of the financial and emotional burden of making funeral arrangements”

INTRODUCTION

As a service to you and your family, Funeral Plan Management, in conjunction with your funeral director, have prepared the Personal & Family Profile booklet. This booklet, when complete, will contain valuable legal and personal information, which can be used in the future as a basis for arranging a funeral. Although this is not a legally binding document, the information will assist your family to meet legal requirements and fulfil your wishes.

Please take care when completing the entries, making sure that all instructions are clear and specific. Should you have any difficulties in completing the booklet, either your funeral director or our staff will be available to assist you.

When complete, this booklet should be stored in a safe place, along with your Will. We recommend that you advise at least two members of your family where you keep these documents.

Note: Please note the date at which you commenced your entries and review the contents on a regular basis, or at least every 4 years.

Date / /

Participating funeral director stamp



PERSONAL AND FAMILY DETAILS

The following information will assist in meeting legal requirements necessary for the registering of a death

Are you of Aboriginal or Torres Strait Island origin?

☐

Yes

☐

No

Family name

Given name(s)

Date of birth

 / / ☐

Male

☐

Female

Place of birth

Date arrived in
Australia (if applicable)

Address

Occupation during
working life

Pension details

Pension type

Pension number



Parent's details

Father's full name				
Father's occupation (during working life)				
Mother's full name				
Mother's maiden name				
Mother's occupation (during working life)				
Number of years (lived in each state)	<input type="checkbox"/> ACT	<input type="checkbox"/> NSW	<input type="checkbox"/> NT	<input type="checkbox"/> QLD
	<input type="checkbox"/> SA	<input type="checkbox"/> TAS	<input type="checkbox"/> VIC	<input type="checkbox"/> WA
	<input type="checkbox"/> CI (Christmas Islands)	<input type="checkbox"/> CKI (Cocos Keeling Islands)		

Current marital status

Please tick (✓) appropriate box

<input type="checkbox"/> Married	<input type="checkbox"/> Widow(er)	<input type="checkbox"/> Divorced	<input type="checkbox"/> Never married	<input type="checkbox"/> Defacto
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First marriage

Age of marriage	
Place of marriage	
Date of marriage	
Name of spouse (Prior to this marriage, full name)	

Second marriage (if applicable)

Age of marriage	
Place of marriage	
Date of marriage	
Name of spouse (Prior to this marriage, full name)	

Give first names, current surnames, gender and date of birth of all children including any legally adopted, stillborn or deceased

Number of children	<input type="text"/>
1. Given names	
Surname	
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="checkbox"/> Male <input type="checkbox"/> Female
2. Given names	
Surname	
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="checkbox"/> Male <input type="checkbox"/> Female
3. Given names	
Surname	
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="checkbox"/> Male <input type="checkbox"/> Female
4. Given names	
Surname	
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="checkbox"/> Male <input type="checkbox"/> Female

If more than four children, please attach details.



DETAILS REGARDING FUNERAL ARRANGEMENTS

Pre-arrangement details

Have you pre-arranged your funeral? ☐ Yes ☐ No

Has money been paid toward the pre-arranged funeral? ☐ Yes ☐ No

If "Yes", complete the following details.

Funeral contract number

Document located at

Amount paid \$ Date paid / /

Preferred funeral service arrangements

Type of funeral ☐ Burial ☐ Cremation

Funeral service preferences (you may tick more than one)

☐ Church ☐ Funeral chapel ☐ Crematorium/Graveside

☐ RSL involvement ☐ Single service ☐ Lodge involvement

Other (please specify)

Existing grave or cremation deeds

Cemetery or Crematorium

Grave or Cremation deed no.

Name of deed holder

People to be notified

Next of Kin

Address

Phone

Solicitor

Address

Phone

Executor

Address

Phone

Person/Clubs/
Associations



ESTATE INFORMATION

Financial details

Name and branch of Institution or Company	Account/Reference number
Bank or Building Society accounts	
1.	
2.	
Investment accounts	
1.	
2.	
Mortgage	
1.	
2.	
Hire purchase agreements	
1.	
2.	
Bank card or credit cards	
1.	
2.	
Insurance policies (car, house, etc)	
1.	
2.	

Financial details

Name and branch of Institution or Company	Account/Reference number
Superannuation	
1.	
2.	
Life Assurance policies	
1.	
2.	
Health - medical benefits	
1.	
2.	
Medicare number(s)	
1.	
2.	
Drivers licence number(s)	
1.	
2.	
Other assets (eg car, property, shares etc)	
1.	
2.	



LOCATION OF DOCUMENTS

Please indicate where the following documents are kept

Will

Certificate of birth

Certificate of marriage

Childrens' birth certificates

Pre-arranged funeral documents

Cemetery or Cremation deeds

Financial documents

(eg bank books, share certificates, certificate of title, insurance policy)

Notes



A LITTLE FORETHOUGHT, A GREAT DEAL OF BENEFIT

By planning ahead you can ensure peace of mind for you and your family.

Pre-arranging and pre-paying your funeral means that you are able to select the service you would like and relieve your family of the emotional and financial burden of making these arrangements themselves.

Also, by pre-paying you can ensure that the cost of the funeral service is fixed forever at today's prices.

If you would like more information regarding pre-paid funeral planning, call Funeral Plan Management on Freecall **1800 804 731** or visit **fpmanagement.com.au**.



At Funeral Plan Management, our simple policies are designed to help you make easy decisions. We provide professional administration and investment information to Australians on all aspects of advance funeral planning. Don't hesitate to contact us for more information.

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TELEPHONE: 1800 804 731 (freecall)
EMAIL: funeralplans@australianunity.com.au
WEBSITE: australianunity.com.au/funeral-plan-bond

FUNERAL PLAN MANAGEMENT PTY LTD

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