

PERSONAL AFFAIRS INFORMATION SHEET

NAME: _____

Will:

Date made: _____

Kept with: _____

Executor(s): _____

Enduring Powers of Attorney:

EPA as to Property

Date made: _____

Attorney/s: _____

Successor Attorney/s: _____

EPA as to Personal Care & Welfare

Date made: _____

Attorney/s: _____

Successor Attorney/s: _____

Contacts:

Next of Kin (contact details): _____

Doctor/s: _____

Accountant: _____

Lawyer: _____

Other professional advisor/s: _____

Funeral plan? (with whom): _____

Accounts:

IRD number: _____

Personal Bank accounts: _____

Joint account
details (if relevant): _____

Other: (Business Bank Accounts, Family Trust Accounts; Term deposits): _____

Properties and interests:

Owned by/with: _____

Other (e.g. Maori land): _____

Mortgage (present sum and Bank): _____

Insurance:

Insurance broker (name): _____

Home and/or contents: _____

Car: _____

Business Interruption: _____

Life insurance: _____

Superannuation: _____

KiwiSaver (name of Provider and number): _____

Investments:

Publically-listed shares held (in which company): _____

Investment advisor (name): _____

Business Dealings:

Partnerships:

Directorships:

Joint Ventures: _____

Shareholdings: _____

Family Trust (Name, Trustees, Beneficiaries):

***Further Details:**
