

Funeral Planner

Plan ahead the simple way. Keep this document in a safe place where your family and executor can find it.



Simplicity means complete peace of mind.

Planning ahead means celebrating your life, your way — and saying goodbye on your own terms. Creating the time to look back on your experiences and the moments that tell your story, and designing a farewell that reflects you.

Planning ahead also makes things simpler for those you leave behind. With this guide, you can let your family know your wishes and record the important information they will need.

Our specialists are ready to answer any questions you might have as you complete your plan.

Call us on [1300 556 222](tel:1300556222)

Full name _____

Address _____

Date of birth _____

Place of birth _____

Year arrived in Australia, if born overseas _____

Contents

Let's start with the funeral	4
Memorialisation	6
Death registration	7
People to contact	8
Important information	9
Guardian Plan	10



Let's start with the funeral

Where would you like your funeral to be held?

Who should speak at the funeral?

Is there a clergy person or celebrant you would like to conduct the funeral?

What music would you like played?

Are there any verses or readings you would like read?

Are there any photos or films you would like shown? Where can they be found?

Are there any rituals or cultural practices you would like observed?

What is your favourite pastime or hobby? Would you like your funeral to be themed for this hobby? For example, with memorabilia or a LifeArt coffin (lifeart.com.au)?

Which flowers or colours do you like?

What food and drink would you like served afterwards?

Are you a returned Service Man or Woman?

Would you like a newspaper announcement of your death and/or funeral?
Where should it be placed?

Who would you like to take care of the finer details of your funeral when the time comes?

Memorialisation

Would you prefer to be buried or cremated?

Do you have any preferences for the style of coffin or casket?

Do you already know what clothes or jewellery you'd like to be dressed in?

Where would you like to be buried or have your ashes placed?

Burial:

Grave Crypt Family estate

Cremation:

Wall niche Rose garden Family estate Scattered

Do you already own a burial plot in a cemetery or a place for your ashes in a memorial park? Yes No

If yes, at which cemetery or memorial park?

If yes, what is the location of the property within the cemetery/crematorium?

If yes, in whose name is the property registered?

What would you like your headstone or plaque to say?

Death registration

This information is required to register a death.

Next of kin

Family name _____ Given name/s _____

Address _____

Phone _____ Email _____

Father's name _____ Usual occupation _____

Mother's name _____ Usual occupation _____

Partner's name _____ Usual occupation _____

Marriage details

Married Divorced Separated Widowed Never married De facto

First marriage

Location _____ Age at marriage _____

Name of your partner _____

Second marriage

Location _____ Age at marriage _____

Name of your partner _____

Children

Name _____ Date of birth _____

Female Male

Phone _____ Email _____

Name _____ Date of birth _____

Female Male

Phone _____ Email _____

Name _____ Date of birth _____

Female Male

Phone _____ Email _____

People to contact

Executor of my will

Family name _____ Given name/s _____

Address _____

Phone _____ Email _____

Where is your will?

Doctor's name _____

Phone _____

Solicitor's name _____

Phone _____ Email _____

Accountant's name _____

Phone _____ Email _____

People to be notified

Name _____

Relationship _____

Phone _____ Email _____

Name _____

Relationship _____

Phone _____ Email _____

Name _____

Relationship _____

Phone _____ Email _____

Name _____

Relationship _____

Phone _____ Email _____

Important information

To make things easier for your family, let them know where to find the following information and documents.

Birth certificate

Passport

Driver's license

Marriage certificate

Divorce certificate

Bank account details

Account numbers, branch

Tax records

Tax file number, location of records

Superannuation

Fund details

Deeds of property

Property addresses, location of records and include deeds/receipt for burial/memorial

Mortgage

Lender reference number and contact details, location of records

Stocks and shares

Location of records

Safe deposit box

Centrelink

Pension number / type of pension

Life insurance

Insurer contact details, policy number

Car

Location of purchase and registration records

Veterans' Affairs

Number

Military Service

Details

Guardian Plan

It's comforting to know that some things can be planned ahead of time.

That's where our prepaid funeral product, Guardian Plan can help. Guardian Plan empowers you to take ownership of what matters to you, and reduce the burden of family decision-making and financial arrangements when it comes time to say goodbye.

Guardian Plan allows you to pay today's prices for chosen funeral services in advance. With your Guardian Plan, peace of mind moves with you. Your selected funeral services are price-protected from day one, and if you relocate, your plan can be transferred to a participating provider within a 70km radius of your new local area.* With over 250 trusted locations across Australia, it's easy to stay covered wherever life takes you.

Guardian Plan offers flexible payment plans of up to three years[^] and no hidden costs.

Guardian Plan is generally exempt from the asset tests for age pension purposes. However, pension eligibility depends on your individual circumstances. Please refer to Services Australia or seek independent advice.

For more information, visit simplicityfunerals.com.au/prepaid or call us on **1300 556 222**.

*Conditions and fees may apply.

[^]Custom preplanned funerals can be paid in interest-free instalments or upfront. A deposit of 30% is required and balance can be paid by monthly payments over a period up to 3 years. Monthly payment instalments are not available for packages. Therefore, full payment is required at the time of arrangement.



Guardian Plan is a prepaid funeral plan, where your funds are invested in a funeral bond by the Over Fifty Guardian Friendly Society Limited 81 087 649 063 AFSL 524353. After the cooling off period, funds cannot be withdrawn and can only be used to pay for the funeral services in your Guardian Plan.



**GUARDIAN
PLAN**

We do not offer financial advice. Guardian Plan is a financial product and may not be suitable for everyone. Before making a decision, consider the Product Disclosure Statement (PDS) on our website guardianplan.com.au and consider whether this option suits your needs.





simplicityfunerals.com.au