

Name: \_\_\_\_\_ Date of birth:     /     /

Address: \_\_\_\_\_

**Making a Will**

Do you have a Will?     Yes      No

Is it current or do you need to update it?

.....  
.....

If you need to update it, how and when will you do this?

.....  
.....

What are the main issues you want to update?

.....  
.....  
.....

Who is the executor named in your Will?

.....

Is this person still relevant, available and aware they have this role?     Yes      No

Where are your original Will and copies kept?

.....

Who knows where your Will is?

.....  
.....

## Reviewing your Financial Resources and Plans

Are there financial issues that you need to consider and make changes to under the following headings? Tick the boxes that are appropriate for you.

### Home mortgage and other debts

Current situation is up to date and appropriate

I need to make changes now. What are these changes?

.....

I am not sure, what information do I need to get to work this out?

.....

.....

### Superannuation

Current situation is up to date and appropriate

I need to make changes now. What are these changes?

.....

I am not sure, what information do I need to get to work this out?

.....

.....

### Life and other insurances, including benefits and entitlements

Current situation is up to date and appropriate

I need to make changes now. What are these changes?

.....

I am not sure, what information do I need to get to work this out?

.....

.....

Do you need to make plans for financial or other forms of support for adult children or others dependent on you?

.....

.....

Do you need to get the advice of a financial planner to discuss your current and future financial plans?

Yes  No

If so, what are the main issues you need to discuss with a financial planner?

.....  
.....

### Organising your Finances So Another Person Can Help With Their Management

Are there financial or customer accounts that you could make joint accounts by adding another person?

- |                                      |  |
|--------------------------------------|--|
| <input type="checkbox"/> Bank        | <input type="checkbox"/> Transport authority |
| <input type="checkbox"/> Electricity | <input type="checkbox"/> Water rates         |
| <input type="checkbox"/> Gas         | <input type="checkbox"/> Insurances          |
| <input type="checkbox"/> Telephone   | <input type="checkbox"/> Investments         |
| <input type="checkbox"/> Council     | <input type="checkbox"/> Other               |

If so, how will you do this?

.....  
.....

Do you want to organise for a family member or friend to have the authority to get information or speak on your behalf with any of these organisations?

- |                                      |  |
|--------------------------------------|--|
| <input type="checkbox"/> Bank        | <input type="checkbox"/> Transport authority |
| <input type="checkbox"/> Centrelink  | <input type="checkbox"/> Water rates         |
| <input type="checkbox"/> Electricity | <input type="checkbox"/> Insurances          |
| <input type="checkbox"/> Gas         | <input type="checkbox"/> Investments         |
| <input type="checkbox"/> Telephone   | <input type="checkbox"/> Other               |
| <input type="checkbox"/> Council     |  |

If so, how will you do this?

.....  
.....

If you are the main person managing financial affairs in your family, what can you do to share that responsibility?

.....  
.....

Are the main papers related to your financial affairs up to date and stored together in one place?

.....  
.....

Who would know where to find the main papers related to your financial affairs?

.....  
.....

## Appointing Someone to Manage Your Finances On Your Behalf

What are your reasons for wanting to complete a Power of Attorney?

.....  
.....

Do you want to make a General or Enduring Power of Attorney and what are the reasons for this?

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.....  
.....

Who will you see to help you complete a Power of Attorney appointment? (e.g. solicitor, community legal centre, public trustee service)

.....  
.....  
.....

Do you need to explain to other family members who and why you have appointed a particular person as your Power of Attorney?

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.....

You can find out more about Power of Attorney by downloading information sheets and the actual forms for your own State or Territory from the START2TALK website

## Power of Attorney Checklist

There are a number of things you will need to consider when completing a Power of Attorney and you can discuss these with the person who helps you complete the form. You may want to print out this checklist and make notes on it:

- Which person or persons would be most appropriate to appoint as my attorney?
- Do they have the necessary skills to manage my assets?
- If I appoint more than one person, do I want them to act only together or separately?
- Do I want to make any specific instructions for my attorney to follow?
- When do I want the attorney to start making decisions – immediately or only when I lose capacity?
- How will the attorney decide when I have lost capacity?

## Next Steps

What further information do you need before going on?

.....  
.....

What is the next step after completing this Worksheet?

.....  
.....

This worksheet is one of a series of worksheets that are part of the START2TALK program administered by Alzheimer's Australia. Full information can be found at [www.start2talk.org.au](http://www.start2talk.org.au)

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