

A GUIDE FOR YOUR FINAL WISHES

...ensure your family knows your last hopes



Investment Zone Pty Ltd (ABN 18 104 622 611) provides financial services as a Corporate Authorised Representative no. 296974 of Financial Force Pty Ltd ABN 42 091 425 464, AFSL no. 238337

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investmentzone
AN INVESTMENT IN YOUR FUTURE

A Guide for your Final Wishes

We have prepared this **Guide for your Final Wishes** document to help your family understand and enact your final wishes immediately following your passing. Please note this does not replace your Final Will & Testament, it is simply a supporting guide for your family to understand any informal wishes you want them to follow. It may also help avoid uncomfortable conversations with loved ones.

This is a fillable PDF file, which means you can complete it electronically. Once you have completed this document, please initial each page and sign on the last page with an e-signature, and save it. Alternatively, print a copy, then handwrite your signature and initial each page.

I confirm these are my instructions and informal wishes in the event of my passing. I understand this document does not replace any part of my Last Will & Testament.

Name: _____

Date: ____/____/____

Note for Executors/Family members: Once you have received a Death Certificate, visit the Australian Death Notification Service <https://deathnotification.gov.au> With one online notification, this service can notify the State Government, and many providers and utility companies, banks and super funds of a person's death.

Formal Documentation

A copy of my Last Will & Testament is kept:

Organisation:
Contact Person:
Phone number:
Email:
Address:

A copy of my Enduring Power of Attorney & Guardianship is kept:

Organisation:
Contact Person:
Phone number:
Email:
Address:

A copy of my Advanced Health Directive (AHD) is kept:

Organisation:
Contact Person:
Phone number:
Email:
Address:
Name of GP/Specialist who signed your AHD:
Surgery/Practice:
Phone number:
Address:

Notifications about your death	
Do you have any wishes in relation to announcements of your passing on social media?	
Would you like an obituary to be published? Please specify the publication/s.	
Funeral Service, and Wake Considerations	
Do you wish to be buried or cremated?	
Do you own a funeral bond, prepaid funeral plan, or have allocated funeral savings? If so, please provide details. <i>Note: According to www.moneysmart.gov.au, private funerals typically cost somewhere in the region of \$4,000 for a basic cremation up to \$15,000 for a more elaborate burial.</i>	
Would you like to have a service or ceremony?	
Do you have any secular or religious requirements for your funeral?	
Would you prefer a private or public funeral?	
Would you like to nominate a particular funeral director/provider?	
Do you have a preference for a type of coffin or casket? Please specify materials, colour etc.	
Would you like an open or closed casket?	
Where would you like your service conducted?	

Do you have any people you'd like to nominate to be pallbearers?	
Do you have someone you wish to perform the eulogy and/or certain people you would like to read at the ceremony?	
Do you have a preference for the contents of the order of service booklet?	
Do you have specific photo(s) you wish to be used in the service? Please advise location.	
Is there any particular music you wish to be played at your service?	
Do you have a wish for certain flowers at your funeral, or donations to be made to particular charities?	
Would you like any written passages or poems included in the service?	
Do you have a particular wish or request for guests attending the service?	
Would you like to be buried/cremated in particular clothes?	
Are there any items you would like buried/cremated with you?	
Do you have a preference of venue for your wake?	

Other considerations	
Do you have a preference of location for a burial plot, tombstone, cremation niche or ashes scattering?	
What would you like on your epitaph?	
If not covered in your Will, is there a plan for the care of your pet(s)?	
Do you have any specific wishes for gifts of personal items and home contents? Please specify the item, location and the recipient.	
Do you have any other notes or instructions for your executor?	

Third Party Providers		
My Financial Adviser is:	Organisation: Contact Person: Phone number: Email: Address:	Investment Zone Brad Macaulay/Amber Simpson 07 3396 8518 admin@investmentzone.com.au 1/184 Bay Terrace, Wynnum, QLD, 4178
My Accountant is:	Organisation: Contact Person: Phone number: Email: Address:	
My Legal Practitioner is:	Organisation: Contact Person: Phone number: Email: Address:	
My Mortgage Broker is:	Organisation: Contact Person: Phone number: Email: Address:	
My Stockbroker is:	Organisation: Contact Person: Phone number: Email: Address:	
Other (please specify)	Organisation: Contact Person: Phone number: Email: Address:	

Do you have a list of friends, relatives, associates and colleagues to ensure they are notified of your passing and alerted to your funeral arrangements?

Please write names and contact details here or provide instructions regarding the location of this list.

Authority

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Name: _____

Signature: _____

Date: ____ / ____ / ____

What is an Advanced Health Directive (AHD)?

At some point in the future, you may be unable to make decisions about your health care, even temporarily. This might be due to an accident, dementia, a stroke or a mental illness. In such circumstances, your AHD would effectively become your voice.

An advance health directive allows you to:

- give directions about your future health care
- make your wishes known and give health professionals direction about the treatment you want
- appoint someone you trust (an attorney) to make decisions about health care on your behalf.





To develop an Advanced Health Directive visit <https://www.qld.gov.au/law/legal-mediation-and-justice-of-the-peace/power-of-attorney-and-making-decisions-for-others/advance-health-directive>

Do you have any plans for organ donation that need placing on the formal record?

The Australian Organ Donor Register is the only national register for people to record their decision about becoming an organ and tissue donor for transplantation after death. Registering is voluntary and people have complete choice over which organs and tissues they wish to donate. If a person does not want to become an organ and tissue donor, they can register their decision not to donate on the Donor Register. To complete your registration to become or not become an organ donor, visit <https://www.donatelife.gov.au/>

If you have any questions, please call us on 07 3396 8518 or email admin@investmentzone.com.au

The information in this communication has been prepared on a general advice basis only. The advice has been prepared without taking account of your specific objectives, financial situation or needs. Accordingly, you should, before acting on the advice, consider the appropriateness of the advice having regard to your objectives, financial situation, and needs. In cases where the advice relates to the acquisition, or possible acquisition, of a particular financial product, you should obtain a Product Disclosure Statement (or other relevant information statements) and consider such document before you make any decision about whether or not to acquire the product. For these reasons, it is imperative that you seek advice from your financial adviser before making any investment decisions. Investment Zone Pty Ltd (ABN 18 104 622 611) provides financial services as a Corporate Authorised Representative no. 296974 of Financial Force Pty Ltd (ABN 42 091 425 464, AFSL no. 238337)

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