

# Personal Profile Record

This document should be filled in and kept in a place known to at least two members of your family or friends.

It provides vital information to help the family meet legal requirements and fulfill your wishes after you have died. This is not a legal document; it is designed to assist your family and friends.

Complete the entries carefully. Make sure that important instructions are clean and explicit, however, you may wish to leave sufficient flexibility for your family to accept or modify your guidance in accordance with their needs.

Ensure that you have an up-to-date Will.

## PERSONAL AND FAMILY DETAILS

Name: \_\_\_\_\_

Place of birth: \_\_\_\_\_

(Years in Australia): \_\_\_\_\_

Date of birth: \_\_\_\_\_

## MARITAL STATUS

Married  Widowed

Divorced  Never Married

Place of marriage: \_\_\_\_\_

Date of marriage: \_\_\_\_\_

Spouse's full name: \_\_\_\_\_

If you have been married previously, details of previous marriage: \_\_\_\_\_

## OCCUPATION

Personal details: \_\_\_\_\_

## CHILDREN

Include names and dates of birth:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## PARENTS

Father's name: \_\_\_\_\_

Occupation: \_\_\_\_\_

Mother's name: \_\_\_\_\_

Mother's maiden name: \_\_\_\_\_

Occupation: \_\_\_\_\_

## NEXT-OF-KIN

Name: \_\_\_\_\_

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

\_\_\_\_\_

## Kleemann Funerals

1 Morphett Street  
Mount Barker SA 5251

Phone: \_\_\_\_\_

**YOUR ESTATE – FINANCIAL AFFAIRS**

Location of Will: \_\_\_\_\_

Solicitor: \_\_\_\_\_

Solicitor’s address: \_\_\_\_\_

\_\_\_\_\_

Solicitor’s phone: \_\_\_\_\_

Executor: \_\_\_\_\_

Executor’s phone: \_\_\_\_\_

Location of property title: \_\_\_\_\_

Mortgage details: \_\_\_\_\_

Details of other properties: \_\_\_\_\_

\_\_\_\_\_

Life insurance policy details, including company and policy number: \_\_\_\_\_

Superannuation details: \_\_\_\_\_

\_\_\_\_\_

Location of general insurance policies, including car, home, et cetera: \_\_\_\_\_

\_\_\_\_\_

Bank accounts, including branches and account numbers: \_\_\_\_\_

\_\_\_\_\_

Location of bank books and income tax details: \_\_\_\_\_

Other assets: \_\_\_\_\_

\_\_\_\_\_

Details of credit arrangements, including hire purchase, bank card, et cetera: \_\_\_\_\_

\_\_\_\_\_

Location of marriage and birth certificates: \_\_\_\_\_

\_\_\_\_\_

**FUNERAL PREFERENCES**

Unless specifically state, the wishes recorded below are suggestions only for the family’s guidance; they are not binding instructions. The family can confirm or change these suggestions to meet their needs at the time.

Pre-arranged/pre-payment details –

Name of funeral director: \_\_\_\_\_

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

Contact Details: \_\_\_\_\_

Location of contact: \_\_\_\_\_

Cremation/burial preferred: \_\_\_\_\_

\_\_\_\_\_

Existing grave or cremation deeds, including name of cemetery, deed number, name in whom grave or deed issued, et cetera: \_\_\_\_\_

\_\_\_\_\_

Club/societies to be notified: \_\_\_\_\_

\_\_\_\_\_

Funeral director preferred: \_\_\_\_\_

\_\_\_\_\_

Other funeral wishes: \_\_\_\_\_

With

Compliments

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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