



Funeral Organiser

Planning Your Goodbye

This complimentary booklet is supplied courtesy of



Somerville Funerals

Honouring Lives

THIS DOCUMENT IS IMPORTANT

It should be kept in a safe place known to your Family or Executor.



“TO MY FAMILY”

“I have completed this guide as a way of relieving you of the sole responsibility and decision making when the time comes.”

Signed: Dated:

FUNERAL ORGANISER

This guide enables you to record your wishes and arrangements in advance, which will assist your family and funeral director to ensure everything is conducted in accordance with your requests, when the time comes. By completing this booklet you are giving your family peace of mind, knowing they are carrying out your wishes.

We have also included information in this booklet starting on page 10 regarding a prepaid Funeral Plan – called The Guardian Plan – Australia’s leading prepaid funeral plan provider.

Should you require assistance in completing it or require further copies of this guide for other family members, please call the number located on the back cover..

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PERSONAL AND FAMILY INFORMATION

Family name			Given name(s)		
Address					
				Postcode	
Date of birth			Female	Male	
Place of birth	Town		City		State
Country			Year arrived in Australia, If born overseas		
Occupation during working life					

Name and Address of Person who I would like to make any Arrangements

(For instance, contacting the funeral director, e.g. executor, solicitor, family member)

Name			Telephone		
Address					
				Postcode	

Funeral Director

(Funeral director you would like to conduct your service and register the death)

Name			Telephone		
Address					
				Postcode	

Next of Kin

(This information is needed when the death is registered.)

Name			Telephone		
Address					
				Postcode	

Executor of my Will

(Executor will need certain financial information when applying for grant of probate.)

Name			Telephone		
Address					
				Postcode	

Copy of my Will

Name			Telephone		
Date of Will					
Deposited with	Name				
Address					
				Postcode	

Solicitor

Name

Telephone

Family Doctor

Name

Telephone

Address

Postcode

Personal Documents

Birth Certificate

Location

Marriage Certificate

Location

Medicare Card

Card number

(to be returned to Medicare office)

Centrelink Pension

Number

Type of pension

Veterans' Affairs

Number

Passport

Name shown on passport

Passport number

Expiry date

(Passport should be returned to passport office in your area, details at local Post Office)

Driver Licence

Number

State of Issue

Club or Association memberships (Should be returned to appropriate organisation. It may be that a claim can be made for unexpired memberships or mortality fund benefit.)

THE FOLLOWING FAMILY, MARRIAGE AND CHILDREN DETAILS ARE NEEDED FOR DEATH REGISTRATION**Family Details**

Father's surname

Given name(s)

Usual occupation

Mother's maiden surname

Given name(s)

Usual occupation

Partner surname

Given name(s)

Usual occupation

Marriage Details (Please tick appropriate box(es))

Married

Divorced

Separated

Widowed

Never married

De facto

Details of Marriage(s)

First marriage

Place/City/Town/Country

Age at date of marriage

Name of partner (at date of marriage)

Second marriage (if applicable)

Place/City/Town/Country

Age at date of marriage

Name of partner (at date of marriage)

Children's Details

(List all children in order of date of birth, including legally adopted, deceased (D), still born (SB), or if no children write "none".)

Full name		Date of birth		Female	Male
Full name		Date of birth		Female	Male
Full name		Date of birth		Female	Male
Full name		Date of birth		Female	Male
Full name		Date of birth		Female	Male
Full name		Date of birth		Female	Male

FINANCIAL INFORMATION - Optional, not relevant to your Funeral Director

(Information below may be required by the executor of your Will.)

Bank account details	Bank name
Account numbers	Bank branch
Location of documents, books, statements	
Building society/Financial institution	Building society/Financial institution name
Account numbers	
Address	
Income tax records	Tax File Number
Location of records	
Deeds of property	Property address(es)
Location of records	
Mortgage details	Location of records
Lender reference number	
Address of lender	
Life insurance policies	Location of records
Superannuation	Details
Stocks and shares	Location of records
Safe deposit box	Box location/number
Location of keys	

Accountant	Name	Telephone
Address		
		Postcode
Car details	Registration number	Registration state
Registration document location		
Location of purchase receipt/H.P. details		
Military Information (if applicable)	Branch of service	
Service serial number		
Date entered service	Place	
Date of discharge	Place	
Grade, rank or rating		
Wars/Conflicts served		

FUNERAL SERVICE INSTRUCTIONS

(If insufficient space - use page 8)

Funeral Director						
Do you have a prepaid funeral? (e.g. Guardian Plan)	Yes	No				
Do you wish to be	Buried	Cremated				
Funeral Service	To be held at the Funeral Director's Chapel at					
OR	at Church in					
I would / would not like a service to be held at the						cemetery/crematorium
Celebrant/Clergyman						
Veteran Service by						
Eulogy by						
Donations to						
Floral Preference	(type, colour, details)					
Newspaper Notices	Death Notice	Yes	No	Funeral Notice	Yes	No
Music Selections						
Do you want a "Viewing" prior to the Funeral Service?	Yes	No				
Coffin/Casket be open for Viewing for	Family only		Those wishing to pay respects			
Type of Coffin/Casket desired	Coffin	Casket	Wood	Metal	Australian Flag	

Clothing	Yes	No	Jewellery on	Yes	No	Glasses on	Yes	No
Special verses/reading etc								
Special Ceremonies					DVD presentation required	Yes	No	
Cultural Traditions					Catering required	Yes	No	

Pallbearers to carry Coffin/Casket:

Name	Address	Telephone
1		
2		
3		
4		
5		
6		

MEMORIALISATION INFORMATION

Have you considered the benefits of Memorialisation?

Our experience tells us the three main reasons people choose Memorialisation are:

- Commemorates a life that was lived
- A restful place for family and friends to reflect and celebrate special times and memories
- A final resting place that can be individualised to meet religious and cultural beliefs

Memorialisation

Do you have an existing family connection with a Cemetery/Crematorium?

If Yes - details

Name of Cemetery/Crematorium preferred

Address

Telephone

Do you now own Cemetery/Crematorium property? (e.g. a grave) Yes No

If Yes, in whose name is the property registered?

If Yes, location of Deed/Receipt (Do not keep in safety deposit box)

If Yes, location of property within Cemetery/Crematorium

I Own/Prefer (mark one)

Burial	Grave	Crypt	Family Estate
Cremation	Wall Niche	Rose Garden	Family Estate
Should the Coffin/Casket be Placed into a Protective Burial Vault?	Yes	No	
Do You want the Family to be Present when the Coffin/Casket is Placed into the Grave or Crypt?	Yes	No	
Type of Memorial Desired	Family	Double	Single

Additional Remarks

SPECIAL INSTRUCTIONS AND INFORMATION

We suggest that you use the below space to keep your instructions and information current.
We also recommend that you always date these entries to avoid possible confusion later.

Large empty rectangular area for special instructions and information.

SPECIAL INSTRUCTIONS AND INFORMATION Continued

Blank area for special instructions and information.

OTHER RELEVANT INFORMATION

Person to be notified	Name	
Relationship	Telephone	
Person to be notified	Name	
Relationship	Telephone	
Person to be notified	Name	
Relationship	Telephone	

ADDITIONAL INFORMATION

CENTRELINK AND VETERANS' AFFAIR PENSIONS

Centrelink (aged) Pension and Veterans' Affair Service Pension

Please confirm your individual entitlements with Centrelink or Veterans' Affairs. The following is provided as a guide only and may differ in some circumstances and is subject to change without notice.

Pensioner Couple (on death of one)

Generally, a pensioner whose pensioner partner dies may receive a Bereavement Payment.

If you were both getting pension, you will get a lump sum Bereavement Payment. The lump sum is made up of up to seven payments of the **difference** between the amount you both got and the single rate you will be paid (where the new single rate is less than the combined 'partnered' rate).

Single Pensioner

The estate may be eligible to a Bereavement Payment.

If a deceased person was receiving a Veterans' Affairs or Centrelink pension or other benefits, the appropriate Department should be notified of the death within 14 days.

VETERANS

Help Provided by the Office of Australian War Graves

Veterans whose deaths are accepted as being caused by war service and those on TPI pensions may be eligible for additional assistance.

THE IMPORTANCE OF A WILL

If you die without a will, the Courts determine who will administer your estate, handle financial matters and act as guardian for your minor children. With a will, you can choose.

In some instances, joint ownership of property may not be a good substitute for a carefully drafted will. As a result of a common accident both you and your partner may die before the survivor has had an opportunity to execute a proper will and the property will pass according to state law.

The law is very exacting in its requirements with respect to the publication, signing and witnessing of wills. It is recommended that this matter be handled by a competent solicitor. Homemade wills often do not stand up in court.

You should review your will every few years, particularly if you have moved or your family situation has changed since you last executed a will. State laws vary as to formal requirements and as to the rights of children and grandchildren born after a will was executed.

When you realise how much is at stake, such as the well-being of your entire family and the protection of your property, you will find that the solicitor's fee for drafting your will and planning your estate is a worthwhile investment.

In the same way that a Will instructs your executor to carry out those wishes, a Prepaid Funeral Plan sets out your wishes regarding your Funeral for your next of kin. It provides emotional and financial peace of mind for you and your family.

Our experience suggests that, like drawing up the provisions of a Will, the best time to make these plans is well beforehand, without hurry or stress. It needs time and thought.

WHAT IS A GUARDIAN PLAN?

The Guardian Plan is a prepaid funeral plan that enables you to prepay your funeral at today's prices. By planning ahead you can ensure peace of mind for yourself and those you care about.

If you would like more information on this service, call Guardian Plan on **1800 773 752** or alternatively speak to your funeral director.

BENEFITS OF A GUARDIAN PLAN

- It allows you to consider alternatives and make decisions concerning your funeral
- You will feel better knowing your affairs are in order and wishes will be carried out as planned
- It relieves family members of stress as your final wishes are in order
- Paying at today's prices means you are protected from inflation

WHAT DOES A GUARDIAN PLAN COVER?

- Professional guidance for your loved ones
- Transfer of deceased during business hours to the funeral home with a 70km radius
- Mortuary care for the deceased prior to the funeral, including preparations for viewings
- Travel protection
- Supply of coffin or casket
- Provision of hearse and other vehicles

CAN YOU PAY BY INSTALMENTS?

Once the price of your Guardian Plan is agreed, you can either:

- Pay in full; or
- Pay by regular monthly instalments

COOLING OFF PERIOD

You have 30 days to ensure you are happy with your plan. If you change your mind simply write or speak to your funeral director.

ACCREDITED FUNERAL DIRECTORS

The Guardian Plan has relationships throughout Australia with various accredited funeral homes. A list of these accredited funeral homes can be obtained by contacting Guardian Plan.



Nerang
Nerang-Broadbeach Road
5596 2233

Southport
44 Nind Street
5531 1722





Somerville Funerals

Honouring Lives

For all location and contact details visit
somervillefunerals.com.au



**GUARDIAN
PLAN**
A prepaid funeral plan

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