



Initially founded as the Independent Order of Odd Fellows (IOOF), KeyInvest has a long, proud history of assisting and caring for the welfare our customers and clients since 1878. Our Financial Products and Retirement Living assist families all over Australia to achieve their financial goals for all of life's major events; be it obtaining property loans, saving for children or grandchildren's education, saving for aged care or long term investment savings.

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Personal Profile Guide

A guide for your family

This document is proudly designed by KeyInvest to be used as a personal guide for your family if they ever needed to know where to find important contacts and information about you.
Please provide copies to your Family and Advisers for safekeeping.



In this document I have recorded important personal details including my funeral preferences. I have provided this information to help guide my loved ones at the time of my passing and to assist with the information required by the relevant authorities.

My Name: _____

Date of Birth: _____

Signature: _____ Date: _____

My Family

Name	DOB	Relationship	Telephone
1. _____			
2. _____			
3. _____			
4. _____			
5. _____			
6. _____			

Key Financial Information

Financial Planner: _____ Location: _____

Accountant: _____ Location: _____

Other adviser(s): _____

Bank(s) / Credit Union: _____ Location: _____

Superannuation Fund Accounts: _____

ASX Listed Shareholdings: _____ Location: _____

Other Investments: _____

Mortgage (location of the title): _____

Life Insurance policies: _____ Adviser: _____

Health Care insurer: _____

Home/Contents/Car insurer: _____ Broker: _____

Home/Contents/Car insurer: _____

Other Instructions: _____

My Estate Information

Date of last / final Will: / /

Location of Will: _____

Power of Attorney: _____

Executor(s): _____

Solicitor: _____

Location of Certificates (birth, marriage etc): _____

My Estate Information

I have a KeyInvest funeral Bond through my financial adviser

I have a pre-paid funeral plan with _____ Funeral Director

I have made other funeral payment arrangements as detailed below:

Details: _____

I prefer to be cremated buried

Funeral location preference: _____

Funeral Director preference: _____

Service preference:

Church Funeral Chapel Graveside Other _____

I prefer: Flowers No flowers Donation in lieu of flowers to:

I am a registered Organ Donor: Yes No

Clubs/Organizations to be notified:

RSL Rotary Schools/University Previous Employers Sport Clubs Charities

Other _____

Social network sites to be closed

Emails Facebook Twitter LinkedIn Other

Details of specific requests:
