

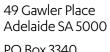
Initially founded as the Independent Order of Odd Fellows (IOOF), KeyInvest has a long, proud history of assisting and caring for the welfare our customers and clients since 1878. Our Financial Products and Retirement Living assist families all over Australia to achieve their financial goals for all 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.



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.







relevant authorities. My Name: ____ Date of Birth: _____ Signature: My Family DOB Relationship Telephone Name **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: __

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

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: