



GUARDIAN  
PLAN

# Funeral Planner

Guardian Plan is a funeral bond issued by the Over Fifty Guardian Friendly Society Limited (the Society)  
ABN 81 087 649 063 AFSL 524353

**THIS DOCUMENT IS IMPORTANT**

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

# Be the author of your own story

Planning ahead means celebrating your life, your way - and saying goodbye on your own terms. Creating the time to look back on your experiences and the moments that tell your story, and designing a farewell that reflects you.

Planning ahead also makes things a little bit easier for those you leave behind. With this guide, you can let your family know your wishes and record the Important Information they will need.

Our specialists are ready to answer any questions you might have as you complete your plan.

Call us on **1800 220 888**.

**Full name**

**Address**

**Date of birth**

**Place of birth**

**Year arrived in Australia, if born overseas**



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# Contents

Let's start with the Funeral	4
Memorialisation	6
Death Registration	7
People to Contact	8
Important Information	9
Guardian Plan	10



# Let's start with the Funeral

Where would you like your funeral to be held?

Who should speak at the funeral?

Is there a clergy person or celebrant you would like to conduct the funeral?

What music would you like played?

Are there any verses or readings you would like read?

Are there any photos or films you would like shown? Where can they be found?

Are there any rituals or cultural practices you would like observed?

What is your favourite pastime or hobby? Would you like your funeral to be themed for this hobby? For example, with memorabilia or a LifeArt coffin ([lifeart.com.au](http://lifeart.com.au))?

Which flowers or colours do you like?

What food and drink would you like served afterwards?

Are you a returned Service Man or Woman?

Would you like a newspaper announcement of your death and/or funeral?  
Where should it be placed?

Who would you like to take care of the finer details of your funeral when the time comes?

# Memorialisation

Would you prefer to be buried or cremated?

Do you have any preferences for the style of coffin or casket?

Do you already know what clothes or jewellery you'd like to be dressed in?

Where would you like to be buried or have your ashes placed?

## Location:

Burial    Grave    Crypt    Family Estate

## Cremation:

Wall Niche    Rose Garden    Family Estate    Scattered

Do you already own a burial plot in a cemetery or a place for your ashes in a memorial park?    Yes    No

If yes, what is the location of the property within the cemetery/crematorium?

If yes, in whose name is the property registered?

What would you like your headstone or plaque to say?

# Death Registration

This information is required to register a death.

## Next of kin

Family Name	Given Name/s
Address	
Phone	Email
Father's name	Usual occupation
Mother's name	Usual occupation
Partner's name	Usual occupation

## Marriage details

☐ Married    ☐ Divorced    ☐ Separated    ☐ Widowed    ☐ Never married    ☐ De facto

## First marriage

Location	Age at marriage
Name of your partner	

## Second marriage

Location	Age at marriage
Name of your partner	

## Children

Name	Date of birth
<input type="checkbox"/> Female <input type="checkbox"/> Male	
Phone	Email
Name	Date of birth
<input type="checkbox"/> Female <input type="checkbox"/> Male	
Phone	Email
Name	Date of birth
<input type="checkbox"/> Female <input type="checkbox"/> Male	
Phone	Email

# People To Contact

## Executor of my will

Family Name  Given Name/s

Address

Phone  Email

Where is your will?

Doctor's Name

Phone

Solicitor's Name

Phone  Email

Accountant's Name

Phone  Email

## People to be notified

Name

Relationship

Phone  Email

Name

Relationship

Phone  Email

Name

Relationship

Phone  Email

Name

Relationship

Phone  Email



# Important Information

To make things easier for your family, let them know where to find the following information and documents.

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**Birth Certificate**

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**Passport**

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**Driver's License**

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**Marriage Certificate**

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**Divorce Certificate**

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**Bank account details**

Account numbers, branch

---

**Tax records**

Tax file number, location of records

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**Superannuation**

Fund details

---

**Deeds of property**

Property addresses, location of records and include deeds/receipt for burial/memorial

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**Mortgage**

Lender reference number and contact details, location of records

---

**Stocks and shares**

Location of records

---

**Safe Deposit Box**

---

**Centrelink**

Pension number / type of pension

---

**Life Insurance**

Insurer contact details, policy number

---

**Car**

Location of purchase and registration records

---

**Veterans' Affairs**

Number

---

**Military Service**

Details

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# Guardian Plan

It's comforting knowing everything will be taken care of, no matter what.

That's where our funeral planning service Guardian Plan can help. Guardian Plan empowers you to take ownership of what matters to you, and removes the burden from your loved ones when it comes time to say goodbye.

Guardian Plan allows you to agree a cost for your funeral at today's prices and be protected from inflation. And while the price is locked down, you're free to move - your Guardian Plan will be honoured by accredited funeral homes with over 250 locations around Australia. All payments are held securely by The Over Fifty's Guardian Friendly Society, under APRA regulation. Funds are only released to the funeral home of your choosing at the time of the funeral.

With payment plans of up to three years and no hidden costs, your loved ones won't be left to pay the bill. Funeral plans are exempted from the asset test, so it may also help maximise your pension if you meet the ATO criteria.

For more information, visit [guardianplan.com.au](https://guardianplan.com.au) or call us on **1800 220 888**.



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We do not offer financial advice. See a financial planner to help you decide on the best option for you.

Visit [guardianplan.com.au](https://guardianplan.com.au) for more information.

