

Care Tool

Important Papers Checklist

Carers NZ's Important Papers Checklist is designed for family carers who provide regular or 24 hour support for an elderly, ill, or disabled family member or friend.

If you become ill or die suddenly, having an up-to-date list of important papers and financial information will ensure uninterrupted care for the person you support.

1. Complete this list and attach it to a large envelope!
2. Keep your important papers in the envelope, and tell at least one other friend, family member, or your solicitor where it is located in your home.

By having all important papers in one place, organising your affairs will be easier if you become seriously ill or die suddenly, allowing others to quickly step in to help the person you support.

If you do not currently have a Will, Enduring Powers of Attorney for property and personal welfare, or other emergency plans in place, talk to your solicitor or local trustee service.

Our Care Planning Tools include:

- Emergency Care Plan
- Medications Plan
- Emergency Carer ID Card
- Important Papers Checklist

Our Care Tools are free to download and print!
Complete each Tool, make copies for others who should have this information, and update details regularly.

My name: _____

Address: _____

Phone: _____

IRD Number: _____

Community Services Card Number: _____

Do you currently receive Superannuation or other government benefits? ☐ Yes ☐ No

Describe: _____

My Bank: _____

Phone: _____

My Solicitor: _____

Phone: _____

My Accountant: _____

Phone: _____

Next of kin or executor (name, phone, address, relationship):

REMEMBER to update your Checklist whenever important details change
Download free tools and plans at www.carersair.net.nz

Important Papers Checklist

Tick box A in each category if the original document is in this envelope or binder, or give details in Box B if the original is stored elsewhere or held by someone else (provide name and contact details):

	A	B
My Will		
Power of Attorney (Property)		
Power of Attorney (Personal care and welfare)		
Deeds and certificates (Birth, marriage, military, property, vehicle, investment etc)		
Insurance, superannuation, other policies		
Cheque, savings, other account numbers		
Assets, debts, tax, family trust details		

Other documents (list below)

1. _____
2. _____
3. _____
4. _____

Detailed summary of preferred funeral and cremation/burial arrangements, contact details of preferred funeral director (or include instructions in this envelope)

Detailed summary of how specific heirlooms, artworks, personal items, and other possessions should be distributed to friends, family, etc (or include instructions in this envelope)

List of contacts who should be notified if I can no longer manage my affairs or die (immediate family, friends, GP, neighbours, church, clubs, service providers etc) (or include instructions in this envelope)

Attach your completed Important Papers Checklist to a large envelope or binder.
Update your Checklist regularly (at least once a year).

REMEMBER to update your Checklist whenever important details change
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