



**karuna**  
dedicated holistic support

*the kindest care*

## Care of the mind

# Being Organised

When living with serious illness there will be many things your family needs to take care of as your health declines.

It is helpful to keep your personal, medical, legal and financial information in one place and accessible so that your family can locate it easily. Relevant information can be organised into categories such as the ones below. Once this is done, concerns or worries you or your family may have about these practicalities can be set aside.

### Will

- The name and contact details of the executor of your Will. This may be a solicitor, the Public Trustee or someone else
- Where your Will is kept

### Finances

- Employer contact details
- Tax file number, recent tax returns, receipts and income details
- Bank account details and routine transactions records such as direct debits
- Details of your assets including superannuation, shares, investments, rental properties
- Centrelink or Veterans Affairs pensions details
- Details of liabilities such as mortgage, credit card, home/ car/ personal loans
- Charitable donations
- Insurances including life, car, home, medical and other
- Contact details of your accountant or other financial services
- Details of any funeral fund or funeral prepayment
- Passport (or number & expiry date)
- Military records.
- Phone and internet contracts
- Internet – a list of your social media and email accounts
- Contact details of your solicitor

### Service Providers

- Gas and electricity suppliers
- Phone providers – landline and mobile
- Cable / satellite TV
- Rates
- Rental agent

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- Body corporate
- Medicare
- Hire equipment
- Chemist
- Loyalty programs and other memberships

### Community contacts

- Health professionals including doctor, dentist, optometrist, physiotherapist
- Church, school or community groups
- Volunteer organisations

### Personal Contacts

- Names, addresses, phone numbers and email addresses of family members and friends

Karuna also has experienced people you can talk with on:  
07 3632 8300 or [karuna@karuna.org.au](mailto:karuna@karuna.org.au)



This is a **Support and Learning** resource. More resources available at [www.karuna.org.au/resources](http://www.karuna.org.au/resources). Karuna is affiliated with [www.fpmt.org](http://www.fpmt.org)