



DALY • MORRIS • FULLER



PERSONAL INFORMATION PACK

Notes for My Executor and Loved Ones

A practical record to help the people managing your affairs find the information and documents they may need.

Important legal status: This pack is not a Will ("Last Will and Testament") and does not appoint an executor, change your beneficiaries or create binding testamentary instructions. Your current valid Will always governs. If you are uncertain, consult a professional.

Prepared for	
Date first completed	
Last reviewed	
Next review due	
Authoritative copy stored at	

This information pack is not a Will. It cannot appoint or replace an executor or amend testamentary instructions. If it differs from your current valid Will, the Will governs.

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00 Quick Start

Complete the essentials first. You can return to the detailed sections later.

1

Find your current signed Will

Record where the original is held. Do not attach this pack to it or use this pack to make changes.

2

Confirm the executor details from the Will

Copy the information exactly from the current signed Will; this pack does not appoint anyone.

3

Identify the essentials

List close family or dependants, key advisers, major accounts, policies, property and liabilities.

4

Set up secure digital access

Consider using a reputable password manager, such as Bitwarden, 1Password or LastPass, and configure emergency or family access where available. Never write the master password in this pack.

5

Protect and store the pack

If saved digitally, encrypt it with Word's Encrypt with Password function. Give the password separately to one or two trusted people and tell them where the file is stored.

6

Review it regularly

Update it at least annually and after major personal, family or financial changes.

Never record access secrets here: Do not enter passwords, PINs, OTPs, full card numbers, CVV numbers, recovery codes, cryptocurrency seed phrases/private keys, alarm codes or safe codes. Record where separate secure access instructions are kept.

Word password protection instructions: support.microsoft.com/word/protect-a-word-document-with-a-password

01 Executor Details

Copy these details from your current signed Will. Do not use this form to appoint or change an executor.

Date of current signed Will	
Executor named in that Will	
Firm / organisation (if applicable)	
Contact person	
Contact details	
Alternate executor named in that Will (if any)	

My personal details

Full names	
Date of birth	
ID / passport number	
Residential address	
Telephone / cell number	
Email address/es	
Tax reference number	
Original Will held at	
Living Will / advance medical directive held at	

02 Personal Wishes and Immediate Information

Record practical information here; anything intended to be legally binding should be addressed in your Will or with professional advice.

Organ donor information	
Funeral policy provider / policy number	
Funeral or memorial wishes recorded at	
Religious / cultural considerations	
Immediate care arrangements for dependants	
Immediate care arrangements for pets	

Other important personal information

03 Family and Dependants

Spouse or life partner

Full names	
ID / passport number	
Contact details	
Relationship / marital status and relevant dates	
ANC (ante nuptial contract), cohabitation or other agreement or order held at	
Other important information	

Children and other dependants

Full name	Relationship	Date of birth / ID	Contact / important information

04 Important Contact People

Include the people your family or executor may need to contact quickly.

Examples: next of kin, attorney, accountant or tax adviser, financial adviser, insurance broker, doctor, employer, business partner, home staff, spiritual adviser and key service providers.

Role / capacity	Name	Firm / organisation	Full contact details

Additional notes

05 Physical Assets

If you have foreign assets, obtain professional advice on whether a separate foreign Will is appropriate.

Immovable property

Property / address	Ownership and title deed location	Bond / finance details	Approx. value and date / notes

Motor vehicles, boats and other registered assets

Description / registration	Location	Finance agreement	Approx. value and date / notes

05 Valuables and Significant Assets

Locations and approximate values are useful. Protect this pack carefully because this information is sensitive.

Examples: jewellery, art, collections, tools, equipment, cash, precious metals, furniture and other items that may be valuable or easily overlooked.

Asset / description	Location	Approx. value and date	Identifying details / notes

Security reminder: Record where an asset or secure container is located, but do not write safe, alarm or firearm-cabinet codes in this pack. State where the separate access instructions or key are securely held.

06 Bank Accounts and Cash Investments

Approximate balances help indicate material accounts. Add the date so the figure is not mistaken for a current balance.

Institution / branch	Account holder / type	Account no. or last 4 digits	Approx. balance and date	Contact / notes

Cash, cards or related information that may otherwise be overlooked

06 Investments, Business Interests and Money Due

Include local and foreign investments, private-company interests, trusts, partnerships, loan accounts and claims.

Investment / interest / claim	Provider / entity	Approx. value and date	Administrator / adviser	Documents / notes

Cryptocurrency: Record the platform or existence of a private wallet and where the secure access plan is held. Never enter seed phrases, private keys or recovery codes in this pack.

07 Policies, Retirement Funds and Medical Cover

Life, disability, accident and other policies

Provider / policy number	Type of cover	Recorded beneficiary information	Broker / contact / notes

One-off or automatic cover that may otherwise be overlooked

07 Retirement Funds, Medical Aid and Funeral Cover

Pensions, provident funds, retirement, life and living annuities etc

Fund / policy number	Recorded beneficiary information	Administrator / adviser	Notes

Medical aid and funeral cover

Provider / policy or member number	Cover	Broker / contact	Notes

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Provider / policy or member number	Cover	Broker / contact	Notes

08 Liabilities

Include mortgages, vehicle finance, personal loans, credit facilities, tax debts, sureties and material amounts owed.

Creditor / contact	Liability	Account / agreement	Approx. amount owing and date	Documents / notes

Guarantees, sureties or possible claims

09 Regular Payments and Subscriptions

This helps identify services to preserve, transfer or cancel and payments that may continue after death.

Examples: utilities, security, rates or levies, rent, insurance, medical aid, memberships, streaming, cloud storage, domain names and annual renewals.

Account / service	Provider	Frequency / amount	Payment method / debit account	Action / notes

Non-recurring or annual payments due

10 Digital Accounts and Secure Access Plan

Identify accounts and devices without placing access secrets in this pack.

Do not enter secrets: Do not record passwords, master passwords, PINs, OTPs, recovery codes, seed phrases, private keys, alarm codes or safe codes here.

Examples: email, mobile phone, computers, cloud storage, social media, websites and domains, online payment portals, subscriptions and cryptocurrency platforms.

Account / device / service	Username or identifying email	Where secure access instructions are held

Password manager or digital legacy arrangement

Password manager / service used	
Emergency or family access configured for	
Separate recovery information held at	

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10 Keys, Secure Storage and Access Locations

Record locations and custodians, but keep codes and access secrets separately.

Examples: home and vehicle keys, safe-deposit arrangements, safes, spare-key boxes, security documents and firearm storage. Obtain appropriate professional guidance where regulated assets are involved.

Item / location	What is stored or protected	Key / access instructions held by or at	Notes

Other security or access information

11 Further Information and Personal Notes

Use this space for practical information or personal messages. This section does not amend your Will or create binding directions.

12 Index of Important Documents

Where this file contains a copy, state where the original is held.

Document	Included?	Original held at / custodian	Date / notes
Current signed Will			
Living Will / advance medical directive			
Separate personal directives or wishes			
Identity documents			
Marriage / relationship / divorce documents			
Property, vehicle and other asset documents			
Trust, company, partnership and loan documents			
Insurance, investment, retirement and tax records			
Liability and agreement records			
Other important documents			
Date this index was last checked			
Person who checked it			

Final reminder: Tell your executor or trusted contact where the current version of this pack is kept. Do not send the completed pack to anyone unless a secure arrangement has specifically been agreed.

Disclaimer: This document is a practical information aid only and is not legal, financial, tax or estate-planning advice. It is not a Will and cannot appoint an executor, amend a Will or create binding testamentary instructions. Obtain professional advice appropriate to your circumstances.

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