

# FUNERAL ORGANISER

*Ultimate care for you, your wishes  
and your family*



WHITE LADY

FUNERALS

*a woman's understanding*

## **“TO MY FAMILY”**

---

“I have completed this guide as a way of relieving you of the sole responsibility and decision making when the time comes.”

Signed: ..... Dated: .....

### **THIS DOCUMENT IS IMPORTANT**

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

## FUNERAL ORGANISER

---

This guide provides you with a place to record your funeral wishes and personal choices, which can be referred to by your family and your funeral director, when the time comes. When you fill in the information in the sections inside, you are showing your care for your family and friends, as the information you add to this book will help them know how you wish to be remembered.

You can also find information on prepaying a funeral with White Lady Funerals within this booklet. Prepaying is the best level of care for those we leave behind as, not only will your funeral wishes be recorded, but you will have added financial protection to the emotional care you are providing for your loved ones.

If you would like further information, or require additional copies of this booklet, you can contact White Lady Funerals on 1300 656 550.

## CONTENTS

---

Personal and Family Information	2	<b>Additional Information:</b>	
Financial Information	4	Centrelink	9
Funeral Service Instructions	5	Veteran's Affairs	9
Memorialisation Information	6	The Importance of a Will	10
Special Instructions and Information	7	Next Steps	11
Other Relevant Information	9	Privacy Policy	12

## PERSONAL AND FAMILY INFORMATION

Family name			Given name(s)		
Address					
				Postcode	
Date of birth			Female	Male	
Place of birth	Town		City		State
Country			Year arrived in Australia, If born overseas		
Occupation during working life					

### Name and Address of Person who I would like to make any Arrangements

(For instance, contacting the funeral director, e.g. executor, solicitor, family member)

Name			Telephone		
Address					
				Postcode	

### Funeral Director

(Funeral director you would like to conduct your service and register the death)

Name			Telephone		
Address					
				Postcode	

### Next of Kin

(This information is needed when the death is registered.)

Name			Telephone		
Address					
				Postcode	

### Executor of my Will

(Executor will need certain financial information when applying for grant of probate.)

Name			Telephone		
Address					
				Postcode	

### Copy of my Will

Name			Telephone		
Date of Will					
Deposited with	Name				
Address					
				Postcode	

**Solicitor**

Name	Telephone
------	-----------

**Family Doctor**

Name	Telephone
Address	Postcode

**Personal Documents**

Birth Certificate	Location
Marriage Certificate	Location
Medicare Card	Card number

(to be returned to Medicare office)

Centrelink Pension	Number	Type of pension
Veterans' Affairs	Number	
Passport	Name shown on passport	
Passport number	Expiry date	

(Passport should be returned to passport office in your area, details at local Post Office)

Driver Licence	Number	State of Issue
----------------	--------	----------------

Club or Association memberships (Should be returned to appropriate organisation. It may be that a claim can be made for unexpired memberships or mortality fund benefit.)

**THE FOLLOWING FAMILY, MARRIAGE AND CHILDREN DETAILS ARE NEEDED FOR DEATH REGISTRATION****Family Details**

Father's surname	Given name(s)
Usual occupation	
Mother's maiden surname	Given name(s)
Usual occupation	
Partner surname	Given name(s)
Usual occupation	

**Marriage Details** (Please tick appropriate box(es))

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

**Details of Marriage(s)**

First marriage	Place/City/Town/Country
Age at date of marriage	Name of partner (at date of marriage)
Second marriage (if applicable)	Place/City/Town/Country
Age at date of marriage	Name of partner (at date of marriage)

## Children's Details

(List all children in order of date of birth, including legally adopted, deceased (D), still born (SB), or if no children write "none".)

<b>Full name</b>		<b>Date of birth</b>		<b>Female</b>	<b>Male</b>
<b>Full name</b>		<b>Date of birth</b>		<b>Female</b>	<b>Male</b>
<b>Full name</b>		<b>Date of birth</b>		<b>Female</b>	<b>Male</b>
<b>Full name</b>		<b>Date of birth</b>		<b>Female</b>	<b>Male</b>
<b>Full name</b>		<b>Date of birth</b>		<b>Female</b>	<b>Male</b>
<b>Full name</b>		<b>Date of birth</b>		<b>Female</b>	<b>Male</b>

## FINANCIAL INFORMATION - Optional, not relevant to your Funeral Director

(Information below may be required by the executor of your Will.)

<b>Bank account details</b>	Bank name
Account numbers	Bank branch
Location of documents, books, statements	
<b>Building society/Financial institution</b>	Building society/Financial institution name
Account numbers	
Address	
<b>Income tax records</b>	Tax File Number
Location of records	
<b>Deeds of property</b>	Property address(es)
Location of records	
<b>Mortgage details</b>	Location of records
Lender reference number	
Address of lender	
<b>Life insurance policies</b>	Location of records
<b>Superannuation</b>	Details
<b>Stocks and shares</b>	Location of records
<b>Safe deposit box</b>	Box location/number
Location of keys	

<b>Accountant</b>	Name	Telephone
Address		
		Postcode
<b>Car details</b>	Registration number	Registration state
Registration document location		
Location of purchase receipt/H.P. details		
<b>Military Information</b> (If applicable)	Branch of service	
Service serial number		
Date entered service	Place	
Date of discharge	Place	
Grade, rank or rating		
Wars/Conflicts served		

## FUNERAL SERVICE INSTRUCTIONS

(If insufficient space - use page 8)

<b>Funeral Director</b>						
<b>Do you have a prepaid funeral?</b> (e.g. Guardian Plan)	Yes	No				
<b>Do you wish to be</b>	Buried	Cremated				
<b>Funeral Service</b>	To be held at the Funeral Director's Chapel at					
<b>OR</b>	at Church in					
<b>I would / would not like a service to be held at the</b>						cemetery/crematorium
<b>Celebrant/Clergyman</b>						
<b>Veteran Service by</b>						
<b>Eulogy by</b>						
<b>Donations to</b>						
<b>Floral Preference</b>	(type, colour, details)					
<b>Newspaper Notices</b>	Death Notice	Yes	No	Funeral Notice	Yes	No
<b>Music Selections</b>						
<b>Do you want a "Viewing" prior to the Funeral Service?</b>	Yes	No				
<b>Coffin/Casket be open for Viewing for</b>	Family only		Those wishing to pay respects			
<b>Type of Coffin/Casket desired</b>	Coffin	Casket	Wood	Metal	Australian Flag	

<b>Clothing</b>	Yes	No	<b>Jewellery on</b>	Yes	No	<b>Glasses on</b>	Yes	No
<b>Special verses/reading etc</b>								
<b>Special Ceremonies</b>					<b>DVD presentation required</b>	Yes	No	
<b>Cultural Traditions</b>					<b>Catering required</b>	Yes	No	

**Pallbearers to carry Coffin/Casket:**

Name	Address	Telephone
1		
2		
3		
4		
5		
6		

## MEMORIALISATION INFORMATION

**Have you considered the benefits of Memorialisation?**

Our experience tells us the three main reasons people choose Memorialisation are:

- Commemorates a life that was lived
- A restful place for family and friends to reflect and celebrate special times and memories
- A final resting place that can be individualised to meet religious and cultural beliefs

**Memorialisation**

Do you have an existing family connection with a Cemetery/Crematorium?

**If Yes - details**

**Name of Cemetery/Crematorium preferred**

**Address**

**Telephone**

**Do you now own Cemetery/Crematorium property?** (e.g. a grave) Yes No

**If Yes, in whose name is the property registered?**

**If Yes, location of Deed/Receipt** (Do not keep in safety deposit box)

**If Yes, location of property within Cemetery/Crematorium**

I Own/Prefer (mark one)

<b>Burial</b>	Grave	Crypt	Family Estate
<b>Cremation</b>	Wall Niche	Rose Garden	Family Estate
<b>Should the Coffin/Casket be Placed into a Protective Burial Vault?</b>	Yes	No	
<b>Do You want the Family to be Present when the Coffin/Casket is Placed into the Grave or Crypt?</b>	Yes	No	
<b>Type of Memorial Desired</b>	Family	Double	Single



### Additional Remarks

## SPECIAL INSTRUCTIONS AND INFORMATION

We suggest that you use the below space to keep your instructions and information current.  
We also recommend that you always date these entries to avoid possible confusion later.

**SPECIAL INSTRUCTIONS AND INFORMATION Continued**

Blank area for special instructions and information.

## OTHER RELEVANT INFORMATION

<b>Person to be notified</b>	Name	
Relationship		Telephone
<b>Person to be notified</b>	Name	
Relationship		Telephone
<b>Person to be notified</b>	Name	
Relationship		Telephone

## ADDITIONAL INFORMATION

### Centrelink (aged) Pension and Veterans' Affair Service Pension

Please confirm your individual entitlements with Centrelink or Veterans' Affairs. The following is provided as a guide only and may differ in some circumstances and is subject to change without notice.

### Pensioner Couple (on death of one)

Generally, a pensioner whose pensioner partner dies may receive a Bereavement Payment.

If you were both getting pension, you will get a lump sum Bereavement Payment. The lump sum is made up of up to seven payments of the **difference** between the amount you both got and the single rate you will be paid (where the new single rate is less than the combined 'partnered' rate).

### Single Pensioner

The estate may be eligible to a Bereavement Payment.

If a deceased person was receiving a Veterans' Affairs or Centrelink pension or other benefits, the appropriate Department should be notified of the death within 14 days.

### Bereavement Payment

Helps ease the adjustment to changed financial circumstances after the death of your partner, child or person you were caring for. The type and amount of Bereavement Payment you receive will depend on your individual circumstances and when Centrelink are notified of the person's death.

## Members of a couple

If your partner dies you may be eligible for a Bereavement Payment. This is paid as a lump sum. It is usually equal to the combined amount you and your partner would have received as a couple, less your new single rate, over a period of up to 14 weeks following your partner's death.

## Further Information

For current and detailed information visit the Centrelink website:

<http://www.humanservices.gov.au/customer/subjects/what-to-do-following-a-death>

## Veterans

### Help Provided by the Office of Australian War Graves

Veterans whose deaths are accepted as being caused by war service and those on TPI pensions may be eligible for additional assistance.

## THE IMPORTANCE OF A WILL

If you die without a will, the Courts determine who will administer your estate, handle financial matters and act as guardian for your minor children. With a will, you can choose.

In some instances, joint ownership of property may not be a good substitute for a carefully drafted will. As a result of a common accident both you and your partner may die before the survivor has had an opportunity to execute a proper will and the property will pass according to state law.

The law is very exacting in its requirements with respect to the publication, signing and witnessing of wills. It is recommended that this matter be handled by a competent solicitor. Homemade wills often do not stand up in court.

You should review your will every few years, particularly if you have moved or your family situation has changed since you last executed a will. State laws vary as to formal requirements and as to the rights of children and grandchildren born after a will was executed.

When you realise how much is at stake, such as the well-being of your entire family and the protection of your property, you will find that the solicitor's fee for drafting your will and planning your estate is a worthwhile investment.

In the same way that a Will instructs your executor to carry out those wishes, a Prepaid Funeral Plan sets out your wishes regarding your Funeral for your next of kin. It provides emotional and financial peace of mind for you and your family.

Our experience suggests that, like drawing up the provisions of a Will, the best time to make these plans is well beforehand, without hurry or stress. It needs time and thought.

## WHAT IS A PREPAID FUNERAL?

A prepaid funeral allows you to plan ahead and document your funeral wishes. Prepaying at today's prices means you can ensure peace of mind for yourself and those you care about.

White Lady Funerals is proud to offer the certainty and reliability of Australia's trusted prepaid funeral service. More importantly, you can rest assured knowing your funds are placed in a Trust managed by the Over Fifty Guardian Friendly Society (Product Disclosure Document approved by ARPA).

## WHY CHOOSE A PREPAID FUNERAL?

- Our experienced and caring staff will guide you through all aspects of prepaying a funeral
- A Prepaid Funeral Plan can be for either yourself or a specified dependent
- Lock in the funeral you want at today's prices – no rising costs, interest charges or inflation to worry about
- Once the price is agreed, you can either pay in full or pay by regular monthly instalments across 3 years
- White Lady Funerals bears any investment risk – not you. The funeral service is guaranteed.
- No payout and claim forms required at time of need – just contact your nearest White Lady funeral director on **1300 656 550** and we will do the rest.

## FURTHER INFORMATION

For more information on a White Lady Prepaid Funeral, contact White Lady Funerals on **1300 656 550** or visit [whiteladyfunerals.com.au](http://whiteladyfunerals.com.au)

## NEXT STEPS

---

### Once you have recorded your wishes, here are some recommended next steps:

Keep this booklet with your important papers.

Inform family and close friends that you have completed this booklet and inform them where it is stored.

Ask family and close friends about their wishes – in case you need to make decisions on their behalf.

Commit to reflecting on your wishes every two years – in case your wishes change.

Further ensure your wishes by considering a prepaid funeral plan.

## PRIVACY POLICY

This Privacy Policy applies to client dealings with InvoCare Australia Pty Ltd ABN 22 060 060 031 (InvoCare) and its related bodies corporate, including White Lady Funerals. We are committed to protecting the privacy of our clients.

### What information do we collect?

We collect a variety of personal information from clients to enable us to tailor our services to meet their personal needs. This may include contact information such as names, addresses, phone numbers and email addresses and credit or debit card information and the card's expiry date.

We may collect personal information by various means, for example, when clients complete an application, enter into an agreement with us, or contact us by phone, send us a letter, visit one of our websites or when they visit us in person. Personal information may also be collected via cameras installed in venues or chapels for the purpose of providing requested services to our clients.

Whilst the choice of how much personal information is disclosed to us is left completely up to the client and, from time to time, clients may be able to deal with us anonymously or by pseudonym, if clients do not provide us with certain personal information we may not be able to provide clients with the services and products that they seek.

We respect your right to privacy and we will only use the personal information for the purposes of providing the personalised funeral-related services that you have arranged. We may also use or disclose personal information for related purposes, such as servicing and managing our relationship with clients, our internal accounting or business management processes and in order to comply with our regulatory reporting and legal obligations.

The full privacy policy is available on our website: [whiteladyfunerals.com.au](http://whiteladyfunerals.com.au)



WHITE LADY  
FUNERALS  
*a woman's understanding*

**1300 656 550**

**[whiteladyfunerals.com.au](http://whiteladyfunerals.com.au)**



**GUARDIAN  
PLAN**  
A prepaid funeral plan

© InvoCare 2017