

Template: My Legal Master List

My Name: [Your Name]

Date Prepared: _____

This is my main list that shows where all my important papers are kept. Please use this as your guide to find what you need.

Section 1: Location of My ORIGINAL Documents

Document Name	Where is the Original Kept?
My Last Will and Testament	<i>(e.g., With ABC Lawyers, Sydney)</i>
Enduring Power of Attorney	
Enduring Guardianship	
Advance Care Directive	
Birth Certificate	
Marriage Certificate	
Title Deeds to Property	
Other:	

Section 2: Who Has Copies of My Documents

Person's Name	What Document Do They Have?
<i>(e.g., John Smith - Son)</i>	<i>(e.g., Certified copy of EPA & EG)</i>

Section 3: My Professional Contacts

Role	Name	Phone Number
My Lawyer		
My Financial Advisor		
My Accountant		
My Doctor (GP)		

Section 4: Bank Safe Deposit Box Details

Do I have a safe deposit box? (Circle one) Yes / No

Bank Name & Branch	Box Number	Who Has a Key / Authority to Access?

Section 5: Plan Review Dates

I last reviewed and updated all my plans on the following dates:

Date	Notes (e.g., Updated Will, Changed Attorney)

Disclaimer: This template is for informational purposes only and does not constitute professional advice. We do not guarantee the accuracy or reliability of its information or calculations.

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