

Contact Us:
02 4933 6888

Address
93 Lawes Street East Maitland NSW 2323
Suite 1, 45 Hunter Street Newcastle NSW 2300

Postal Address
PO BOX 2519 Green Hills 2323
office@bottrellaccounting.com.au
www.bottrellbusiness.com.au



BBC Checklist of important documents

Your Name:

Date:

Documents

Location and Details

Will, Power of Attorney and Appointment of Enduring Guardian	Location:	
	Dated:	
Birth and Marriage Certificates	Location:	
Credit Card Details	Bank:	Bank:
	Account Name:	Account Name:
	Card No.:	Card No.:
Bank Account Details	BSB:	BSB:
	Account No.:	Account No.:
Drivers licence and Passport	Licence No.:	Passport No.:
	Expiry:	Expiry:
Insurance Policies	Broker's Details:	
Mortgage(s)	Bank:	
	Account No.:	



CHARTERED ACCOUNTANTS
AUSTRALIA + NEW ZEALAND

Liability limited by a scheme approved under Professional Standards Legislation

Superannuation Statements	Adviser Details:
	Funds(s):
	Binding Nomination: <input type="checkbox"/> Yes <input type="checkbox"/> No
Title Deeds	Bank or Location:
Investment	Broker Name:
Car	Rego:
	Insurance:
Funeral Plan	
Company Directorships	
Safety Deposit	Location:
	Key:
Education and Employment	Current Employer:
	Academic Records:
Tax records - 7 years	Accountant/ Tax Adviser:
	Name:
	Address:
Spouse	Name:
	Contact No.:



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Lawyer	Firm Name:	
	Address:	
Primary Care Physician	Practice:	
	Address:	
Dentist	Bank or Location:	
Accountant/ Financial Adviser		
Health Fund	Name:	
	Account No.:	
Travel Insurer	Name:	
	Account No.:	
Funeral Director		
Building/ Strata Management	Strata Plan:	
	Managing Agent:	
Relatives	Name:	
	Address:	
	Phone:	Email:



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Work (Best contact person)	Name:	
	Address:	
	Phone:	Email:
Friends	Name:	
	Address:	
	Phone:	Email:
Clubs and Associations	Name:	
	Address:	
	Phone:	Email:
Any other special people	Name:	
	Address:	
	Phone:	Email:



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