

Life's key investments

KeyInvest is a Financial Services and Retirement Living organisation founded on a long and proud history of caring for the welfare of our members.

Our origins date back to 1878 as the Independent Order of Odd Fellows or IOOFSA, and we remain a member based Friendly Society providing a range of financial and investment services to help our customers achieve their goals.

Now, as KeyInvest, we continue this tradition with a focus on "Life's key investments", helping our customers access home finance, saving for their children's education or home or enjoying their retirement lifestyle.



Personal Profile Guide

A guide for your family

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This document is proudly designed by KeyInvest to be used as a personal guide for your family.
Please provide copies to your family and Advisers for safekeeping.



In this document I have recorded important personal details including my funeral preferences. I have provided this information to help guide my loved ones at the time of my passing and to assist with the information required by the relevant authorities.

My Name: _____

Date of Birth: _____

Signature: _____ Date: _____

My Family

| Name | DOB | Relationship | Telephone |
|----------|-------|--------------|-----------|
| 1. _____ | _____ | _____ | _____ |
| 2. _____ | _____ | _____ | _____ |
| 3. _____ | _____ | _____ | _____ |
| 4. _____ | _____ | _____ | _____ |
| 5. _____ | _____ | _____ | _____ |
| 6. _____ | _____ | _____ | _____ |

Key Financial Information

Financial Adviser: _____ Location: _____

Accountant: _____ Location: _____

Other adviser(s): _____

Bank(s) / Credit Union: _____ Location: _____

Superannuation Fund Accounts: _____

ASX Listed Shareholdings: _____ Broker: _____

Other Investments: _____

Mortgage (location of the title): _____

Life Insurance policies: _____ Adviser: _____

Health Care insurer: _____

Home/Contents/Car insurer: _____ Broker: _____

Home/Contents/Car insurer: _____

Other Instructions: _____

My Estate Information

Date of final Will: _____ / _____ / _____

Location of Will: _____

Power of Attorney: _____

Executor(s): _____

Solicitor: _____

Location of Certificates (birth, marriage etc): _____

My Funeral Preferences

I have a KeyInvest Funeral Bond through my Financial Adviser

I have a pre-paid funeral plan with _____ Funeral Director

I have made other funeral payment arrangements as detailed below:

Details: _____

I prefer to be cremated buried

Funeral location preference: _____

Funeral Director preference: _____

Service preference:

Church Funeral Chapel Graveside Other _____

I prefer: Flowers No flowers Donation in lieu of flowers to:

I am a registered Organ Donor: Yes No

Clubs/Organizations to be notified:

RSL Rotary Schools/University Previous Employers Sport Clubs Charities

Other Memberships _____

Social network sites to be closed:

Email Facebook Twitter LinkedIn Skype Subscriptions

Details of specific requests:
