

What Happens When...?

- **Preparing for a 'WHAT HAPPENS WHEN ...?' moment**

The following information may help you and your family prepare for an unexpected life event which may leave you unable to convey your wishes. It is based on the Probus Club of Balnarring's seminar held on Tuesday 3rd March 2015 and was prepared in conjunction with presenters at that seminar. It has been altered slightly to improve the layout.

It is recommended that you and the key people in your life use the material below as a basis for discussion and recording your subsequent decisions

- **What key information should I write down and in what form?**

This is best done as an '**ICE PLAN**' (In Case of Emergency). An ICE Plan is a document containing information to help your family/executors cope with the unexpected. Having this Plan should remove much of the worry from your wife/husband/partner about your ongoing accommodation, care, financial affairs or funeral.

An ICE Plan typically prompts you to document information under headings such as:

- Those closest to you. A list of your family members and executors with contact details;
- Your personal information. Name, DOB, Place of birth, drivers licence no. etc.;
- Your government interaction details such as tax file number. Passport details, Pension details;
- Location of important documents such as birth and marriage certificates and your passport;
- The name and contact details for your solicitor and financial adviser;
- The name and contact details for your doctor, dentist and other specialists;
- Your banking and credit card details including automatic monthly payments;
- Your insurance details including health, house and contents, motor vehicles etc.;
- Your major physical assets and where to find property titles;
- Your investments and where to locate all of the information to be able to manage your estate;
- Details of your legal affairs including your will, power(s) of attorney etc. and where they are stored;
- The secure location where you keep passwords for your computer, electronic banking, mobile phones etc.;
- Instructions for the conduct of your funeral and your status as an organ donor.

Useful link which may assist in preparing your ice plan.
(When clicked on, the relevant website will be displayed.)

Full service ICE Plan:

<http://www.iceplan.com.au/>
