

MANCHESTER UNITY FRIENDLY SOCIETY

PERSONAL INVENTORY of

NAME _____

DATE ____/____/____

**This document contains useful information
for the time of my death**

The enclosed information is applicable in New Zealand

KEEP THIS DOCUMENT IN A SAFE PLACE

**You should review this document every 5 years or when an earlier
important event takes place**

BE PREPARED IN ADVANCE WITH INFORMATION THAT WILL BE REQUIRED AT THE TIME OF DEATH

Death is something we all are going to have to contend with. Because of legal requirements of the Department of Justice, the following information, which may only be known to you, next-of-kin, or any person who will be responsible for making arrangements for your funeral. By completing this document questions will be answered more accurately than otherwise may be the case. It is recommended that you seek professional advice if you are unsure of any matters.

MAKE A WILL

Everyone over the age of 18 should make a will. Your Solicitor, the Public Trust or other trustee organisation is available to advise you as to the precise contents which accurately reflect your wishes. Once made, it is wise to review the will periodically to ensure it is kept up to date regarding your changing circumstances and requirements.

WHAT TO DO WHEN SOMEONE DIES

This depends a little on where the person dies and the manner of death. If death occurs at a nursing home or in a hospital, call the funeral director for advice and information. If death occurs at home, the first thing needed is call the doctor. After this and before any further arrangements are made, call a funeral director who will be able to provide a guide on all the things that need to be done.

WHEN THE CORONER IS INVOLVED

The Coroner may become involved when

- a doctor is unavailable, or unable, to establish the cause of death
- it is a sudden unexpected death
- death is from other than natural causes
- it is an accidental death
- no recent consultation with a medical practitioner has occurred
- the deceased is a mental health patient or death occurs in official care or custody

In these cases it is important that the deceased is not moved or disturbed in any way without the permission of the Coroner. It is the duty of the police to assist in such cases, and when they do so they act as the Coroner's agent. It must be realised that although the police may be involved, the family or executor still has the responsibility of making contact with the funeral director of choice for the funeral arrangements. In these cases it is the duty of the Coroner to investigate and ascertain the cause of death. To achieve this it may be necessary for the

detailed physical and medical examination to be carried out by a pathologist at a public mortuary. This is known as a post-mortem examination or autopsy. The cause of death as determined by the pathologist would be submitted to the Coroner who may decide to hold an inquest into the circumstances relevant at the time of death. The inquest, which is a formal hearing in court, may be held sometime later. The cause of death has particular relevance in the light of the Accident Compensation Corporation's duty to compensate the dependants of the accident victims and to contribute towards funeral expenses. If no inquest is to be held, all matters pertaining to the ACC claims or estate probate can proceed immediately.

The involvement of the Coroner is a totally separate procedure from the funeral so it is worth noting two points.

- It is still the next-of-kin or nominated person's responsibility to organise the funeral.
- It is their right to choose the funeral director. (There is no obligation to use the funeral director contracted by the Police for the original transfer)

PROBATE

To administer an estate may require an application for probate. There are detailed Court rules covering an application for Probate and legal advice should be obtained. It is not necessary to obtain Probate in all cases. It will depend on what assets the person has.

LETTERS OF ADMINISTRATION

If a person dies without a valid will the law provides a procedure known as Letters of Administration. This is quite technical and legal advice should be obtained. The law details who become the beneficiaries and what share of the estate they are entitled to. Legal advice is essential to ascertain what the position is for any particular situation.

ENDURING POWERS OF ATTORNEY

Enduring Powers of Attorney are a special form of powers of attorney that can be set up to continue after the donor loses mental and/or physical capacity. There are two types. One is for personal care and welfare which covers such things as nursing and medical care decisions. The other is property which covers such things as bank accounts, insurances, investments and property (land and buildings).

In both cases an "Attorney" (not necessarily a Lawyer) is named and a substitute may also be named. The Donor must receive independent advice and sign before a lawyer.

TRUSTS

If you have a family trust you should ensure that your family and executors of your will are aware of its existence. If you want to consider forming a trust you should seek professional advice from your solicitor or a trust company.

IMPORTANT DOCUMENTS

You should keep important documents together in a safe place. Even consider a small documents box that can be easily picked up and taken if you have to leave your home in an emergency. These include Birth Certificate, Passport, Copy of Will, copy of Drivers Licence and IRD information.

I AM A MANCHESTER UNITY MEMBER

Membership number _____/_____

I have the following benefits with Manchester Unity Friendly Society:-

- | | |
|------------------------------------|--------|
| - Funeral Assistance Benefit | Yes/No |
| - Funeral Plan | Yes/No |
| - Increasing Assurance Benefit | Yes/No |
| - Medical Benefit | Yes/No |
| - Share Funds payable to my Estate | Yes/No |

There are options available to claim what is due to the estate of the deceased member. They are dependent on the total amount payable by Manchester Unity and include payment to the Funeral Director, payment to the Solicitor handling the estate and payment to the executors of the estate. The requirements will differ from member to member. For full information on what is required your Executor/Estate Administrator should contact Manchester Unity Head Office on 0800 101 842.

In all instances a certified copy of the death certificate will be required. The Funeral Director will provide an original death certificate as part of their process. A certified copy is a photocopy of the original, certified by a **Solicitor** or **Justice of the Peace** as being a true copy of the original.

PERSONAL PROFILE

The information below includes that required by the Registrar-General of Births, Deaths & Marriages. Please complete fully to ensure your personal details are accurately recorded.

About Me

Surname/Family Name _____ (Mr /Mrs /Miss /Ms)

First/Given Names _____

Address _____

Date of Birth ____/____/____ Birth Place _____

Type of Relationship

Single/Married/Civil Union/De Facto/Separated/Divorced/Widowed

Surname at Birth _____

First/Given Names at Birth _____

Ethnic Group _____

Are you Descended from N.Z. Maori? YES/NO

If not born in N.Z., Year of Arrival _____

Occupation/Profession _____

Are You A Justice of the Peace YES/NO

A Marriage or Civil Union Celebrant YES/NO

Any Honours or Awards Received _____

Overseas or N.Z. Service

Which War/Country _____

Military Service Number _____

Military Rank _____ Unit or Regiment _____

Relationships

Spouse/Partner

Date of Union ____/____/____ Place of Union _____

Surname/Family Name _____ (Mr /Mrs /Miss /Ms)

First/Given Names _____

Address _____

Date of Birth ____/____/____ Birth Place _____

Any other unions can be added on a separate piece of paper

Parents

Mother's Full Name _____

Mother's Full Name at Birth _____

Mother's Date of Birth ____/____/____ Date of Death ____/____/____

Mother's Occupation _____

Father's Full Name _____

Father's Full Name at Birth _____

Father's Date of Birth ____/____/____ Date of Death ____/____/____

Father's Occupation _____

Children

Surname/Family Name _____ (Mr /Mrs /Miss /Ms)

First/Given Names _____

Address _____

Date of Birth ____/____/____ Birth Place _____

Surname/Family Name _____ (Mr /Mrs /Miss /Ms)

First/Given Names _____

Address _____

Date of Birth ____/____/____ Birth Place _____

Surname/Family Name _____ (Mr /Mrs /Miss /Ms)

First/Given Names _____

Address _____

Date of Birth ____/____/____ Birth Place _____

Surname/Family Name _____ (Mr /Mrs /Miss /Ms)

First/Given Names _____

Address _____

Date of Birth ____/____/____ Birth Place _____

Surname/Family Name _____ (Mr /Mrs /Miss /Ms)

First/Given Names _____

Address _____

Date of Birth ____/____/____ Birth Place _____

Other Information

Please fill in information needed to contact and deal with these items.

INVESTMENTS

Banks _____

Other financial provider _____

Superannuation/Kiwisaver _____

Bonus Bonds _____

CLUBS AND ASSOCIATIONS

RSA _____

Clubs _____

Church _____

Other _____

PROFESSIONALS

Names & Contacts

Solicitor _____

Accountant _____

Doctor _____

Dentist _____

INSURANCES

Life _____

Funeral _____

House _____

Content _____

Vehicle _____

Medical _____

OTHER ITEMS

Inland Revenue Department Number _____

Landlords Name/Contact _____

Electrical/Gas/Water supplier _____

Telephone Company _____

Work & Income _____

Home Nursing Care _____

Meals on Wheels _____

Retailer Charge Cards (e.g. Farmers, Warehouse) _____

NZ Police (Firearms section) _____

Person Arranged to Take Control of Firearms _____

Birth Certificate _____

Drivers Licence Number _____

Passport Number _____

It is also recommended that someone you know and trust either knows your various passwords or can access your “Password Vault” (password storage program) in the case these are needed.