

mylifePortfolio

HELP

Many people create a will that instructs what an Executor should do with with an estate, but often will receive little instructions on ALL assets, liabilities and information on how to easily transfer ownership.

MyLifePortfolio is an application that will create a report to assist an Executor in dealing with your estate.

To use this application the user should fill in as much information as possible before Saving a draft. There are just three mandatory fields, Name, Email and Date of Birth.

On Saving, a report will be mailed to you including a link to re-open the portfolio with an access code. You may re-open the report until you have completed the form and SUBMITTED.

By submitting, you are sending a completed report to nominated Authorities and have informed your Executor on the whereabouts of the report. They will receive an email informing them of these facts.

You will receive a copy of the report, a file containing all of the data you entered, to assist you if you return to the application to change details. You will also receive a calendar file to create a reminder to update your details if they have changed.

Each new portfolio created will require the payment of a fee, through the secure payment gateway.

This site is encrypted to protect the data you are entering. It cannot be viewed by unwanted parties.

Explanation of form fields (obvious fields have not been included)

Location of Birth Certificate	Where your birth certificate is – e.g. In bottom drawer
Citizenships	Current citizenships e.g. Australian/Italian
Date of Citizenships	If your original citizenship has changed, indicate date changed
Executors -	Person authorised to deal with your estate on death. You may nominate more than one by adding rows. You should inform your Executor/s on the location of your portfolio
Authorities	Authorities are persons who may assist you with your affairs e.g. Lawyer, Financial Advisor. You should send a copy of your portfolio to at least one authority
Location of essential documents	The location of documents such as deeds, wills or powers of attorney. e.g. in drawer or at lawyer.
Location of Safe Custody Box	Your lawyer or bank may have a safe custody box for your valuables
Name of Authority to open box	A person who may be able to open your safe custody box – besides you.
Health Care Directive	If you are not able to make decisions on your health care – name the person/s who may be

	able to give directions
Location of Original Document	If you cannot make decisions on your health you may nominate a person to give directions and what those directions are, through an instrument. e.g. Power of Enduring Guardian
Personal Accounts	Details on type and locations of bank accounts. There is no need to give account numbers to protect your security, should the portfolio document fall into unauthorised hands
I am invested in family trust	If you have a trust, check box and give name of trust and the trustee's address
I own real estate	If you own real estate, check box and give details of mortgages and location of deeds
Property/contents insured with	Fields that allows for multiple insurance companies
Other real estate I own or control	General field to give information on real estate that you may not have deeds
Other Assets	List any other assets not already listed
Liabilities	Multiple fields that allow a listing of all liabilities
Business Accounts	Add rows to give information on business accounts

Other details	A catch all field to allow details of any items not listed. Use this field for all Utilities that may require ongoing payments
Portfolio Review	You may review any page by using the links provided.
Terms and Conditions	Read the Terms and Conditions and check the box if you agree
Save	At any time you may Save. You will receive a report in an email which will give instructions on how to re-open your portfolio with a link
Submit	When you have completed all fields you may Submit, which will start a process to send you an email with the final report, a data file to be used if you want to update your portfolio and a calendar file to create a reminder in your calendar.
Payment	MyLifePortolio uses a secure Payment Gateway through our bank. No details are recorded by us or the Gateway provider.