THE
EXECUTIVE HUB

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The Green Box

The Green Box: A Smart Risk-Management Tool Every Business Leader Should Have.

www.theexecutivehub.com.au

Green Box Toolkit

Your Green Box, provides peace of mind and continuity when it matters most.

The Green Box is a practical preparedness guide designed to help ensure clarity, continuity and peace of mind in the event of an emergency or unexpected absence. It brings together critical personal and business information in one secure place, making it easier for others to step in, make informed decisions and keep things moving when you cannot.

Who this is the Green Box for?

While the Green Box is particularly valuable for CEOs, business owners and senior leaders, where personal decisions and business operations are often closely intertwined. The Green Box is equally relevant for individuals, families and professionals at any stage of life. By clearly documenting key information, important contacts and where essential documents are kept, the Green Box reduces uncertainty and stress at a time when clear guidance matters most.

Where to start?

Putting together your own Green Box may feel overwhelming. This guide and checklist will help you get started or it can be used to further develop your existing version.

The process of putting your Green Box together may take you some time, so the first step should be that you just make a start.

Awareness

There is no point or benefit in having a Green Box, if no one knows about it, so make sure you choose someone you can trust and remind them regulary of its existance and location.

Other Considerations:

- Make sure you Green Box is hidden and well out of site
- Make sure however that it is accessible to those that need to know
- Consider making a diary note to review and update your Green Box annually
- If you include copies, it is recommended that they are certified

When creating or adding to your Green Box its a perfect opportunity to also review any arrangements or contracts and check things like;

- Is the protection/cover adequate?
- Is there a better or more suitable cover for my business (or personal)

Your Green Box is unique to you, your family and business, so what you put into it, is completely your choice. Remember your Green Box is only as good as the last time it was updated and the information that's stored in it.

Your Green Box Checklist

LEGAL AND ESTATE

	Your Will and its location
	Letter of wishes
	Advanced Care Directive
	Enduing Power of Attorney
	Directions for Guardianship
	Birth Certificate
	Marriage Certificate
	Divorce Decree
	Court Orders
	Family Trust
	Company Constituton

ID DOCUMENTATION

	Drivers Licence details (copy)
	Passport details (copy)
	Membership cards (copies)
	Medical History and other medical information of significance
	Photos of tattoors or other ID Marks
	Last Resume/CV

BANKING AND INVESTMENTS

	Bank account details
	Photocopy of credit/debit/ATM cards
	Details of Term Deposits
	Instructions for short term access to financial resources
	Property certificates of title and mortgage documents
	Statement of assets and liabilities
	Details of Superannuation Fund including binding death nominations
	Details of share portfolio, managed funds investment properties, bonds etc

OTHER

	Jewellery valuations and photos of vaulable items
	Letters and videos to loved ones
	Pre-paid funeral details and instructions
	Family structure
	Notes for eulogy
	Keepsakes and instructions for particular items
	Subscriptions
	Details of social media and email accounts (passwords, user names)
	Location of stored data including photos, videos
	Vehicle registrations

CONTACTS

	Doctors name and contact details
	Dentists name and contact details
	Lawyers name and contact details
	Accountants name and contact details
	Financial advisors name and contact details
	Names and contactd details of ‘trusted advisors’ the ‘Go To People’
	Other names and contact details
	Details of utilities (electricity, gas, internet etc)

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GET IN TOUCH

www.theexecutivehub.com.au

We hope you found this toolkit useful. If you'd like to learn more about The Executive Hub community or to speak to one of our experienced advisors please contact us for a confidential discussion.

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May your Green Box provide you and your family with peace of mind for life. This information is kindly referenced from, and provided by Mark Lewis, Bernie Lewis Homeloans.

The information in this document is general advice only and does not constitute personal advice. It has been prepared without taking into account any of your individual objectives, financial solutions or needs. Before acting on this advice you should consider the appropriateness of this advice, having regard for your own objectives, financial situation and needs.