

Where Everything Is

PERSONAL INFORMATION	
Name	
Date of Birth	
SIN	
Name	
DOB	
SIN	
Places of Work	
Family Doctor	
Other Medical	
Lawyer	
Accountant	

Financial Planner	
Estate Planner	

BANKING INFORMATION

Bank Accounts	
Safe Deposit Boxes	

LIFE INSURANCE

Policy No. 1	
Policy No. 2	

Policy No. 3	
Policy No. 4	
Policy No. 5	

OTHER INSURANCE

Automobile No. 1	
Automobile No. 2	
Automobile No. 3	
Automobile No. 4	
House	
Recreation Vehicles	
Trailer	

PENSION PLANS

WHERE TO FIND	
Organ Donation	
Will	
Living Will	
Birth Certificate	
Marriage Certificate	
House Keys	
Vehicle Keys	
Safe Deposit Box Keys	

INVESTMENTS

Savings Bonds	
GICs, Term Deposits	
RRSP	
RRIF	
TFSA	
Stocks	
Mutual Funds	
Other Investments	

WILLS

Last Reviewed	
Executors	
Last Reviewed	
Executors	

POWERS OF ATTORNEY

Last Reviewed	
Last Reviewed	

PERSONAL DIRECTIVES

Last Reviewed	
Last Reviewed	

CREDITORS

Lines of Credit	
Loans	
Mortgages	
Reverse Mortgages	
Leases	
Credit Cards	

UTILITIES

Power	
Water	
Electricity	
Newspaper	
Landscape	

Snow Removal	
Taxes	
Telephone	
Cell phone	
Internet	
Cable	
Satellite	
Subscriptions	

MORE INFORMATION	
Other Property	

DIGITAL ARTS

Loyalty and Points Programs

Air Miles	
Aeroplan	
Other	

Online Banking Passwords

Bank/Investment	

Website Passwords

Email

Google / Yahoo

YouTube

Facebook

LinkedIn

Twitter

Instagram

Other

Other information on your assets and liabilities you want your executor to know:



FUNERAL WISHES

Outline any special wishes you may have about your funeral:

