

# WHERE IS EVERYTHING?!



Fill out this form and keep one copy with your Will and give a second copy to your executor or next of kin.  
Be sure to update this form as frequently as necessary.

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ SIN: \_\_\_\_\_

Place of Work /Employer: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Family Doctor: \_\_\_\_\_

Lawyer: \_\_\_\_\_

Accountant: \_\_\_\_\_

Estate & Financial Planner: \_\_\_\_\_

## *Banking & Insurance Information*

Account #s: \_\_\_\_\_ Chequing: \_\_\_\_\_ Saving: \_\_\_\_\_ Other: \_\_\_\_\_

Bank Branch: \_\_\_\_\_ Bank Manager: \_\_\_\_\_ Phone: \_\_\_\_\_

Life Insurance Policies: # \_\_\_\_\_ Company: \_\_\_\_\_

# \_\_\_\_\_ Company: \_\_\_\_\_

# \_\_\_\_\_ Company: \_\_\_\_\_

Property Insurance:# \_\_\_\_\_ Company: \_\_\_\_\_

Auto Insurance:# \_\_\_\_\_ Company: \_\_\_\_\_

Property & Casualty Broker: \_\_\_\_\_ Phone: \_\_\_\_\_

Pension Plans: \_\_\_\_\_

Private Loans: \_\_\_\_\_

Club Memberships: \_\_\_\_\_

## *Where to Find*

Organ Donation Forms \_\_\_\_\_ Safety Deposit Box Key \_\_\_\_\_

Living Will Instructions \_\_\_\_\_ Canada Savings Bonds \_\_\_\_\_

Birth Certificate \_\_\_\_\_ GIC's, Certificate of Deposits, Term Deposits \_\_\_\_\_

Marriage Certificate \_\_\_\_\_ RRSP, RRIF, LIF, DPSP \_\_\_\_\_

Divorce Decree \_\_\_\_\_ Stocks \_\_\_\_\_

House Keys \_\_\_\_\_ Mutual Funds \_\_\_\_\_

Vehicle Keys \_\_\_\_\_ Bonds \_\_\_\_\_

Cottage Keys \_\_\_\_\_ Tax Shelter Investments \_\_\_\_\_

## *Wills*

Document Location \_\_\_\_\_ Last Reviewed (dd/mm/yyyy) \_\_\_\_\_

Executors \_\_\_\_\_ Guardian(s) of Children \_\_\_\_\_

----- **Power of Attorney** -----

Document Location \_\_\_\_\_ Last Reviewed (dd/mm/yyyy) \_\_\_\_\_

Person(s) Named for Financial Decisions \_\_\_\_\_

----- **Personal Directives (Living Will)** -----

Document Location \_\_\_\_\_ Last Reviewed (dd/mm/yyyy) \_\_\_\_\_

Person(s) Named for Personal Care \_\_\_\_\_

----- **Planned Giving Clause** -----

Document Location \_\_\_\_\_ Last Reviewed (mm/dd/yyyy) \_\_\_\_\_

Charities to Support \_\_\_\_\_

----- **Creditors** -----

Lines of Credit \_\_\_\_\_ Reverse Mortgage \_\_\_\_\_

Loans, Promissory Notes, Guarantees \_\_\_\_\_ Lease Ents \_\_\_\_\_

Mortgages \_\_\_\_\_ Other Liabilities \_\_\_\_\_

----- **Social Media & Email Accounts** -----

Account \_\_\_\_\_ User-name \_\_\_\_\_ Password \_\_\_\_\_

Account instructions \_\_\_\_\_

Account \_\_\_\_\_ User-name \_\_\_\_\_ Password \_\_\_\_\_

Account instructions \_\_\_\_\_

Email Address \_\_\_\_\_ Password \_\_\_\_\_

Account instructions \_\_\_\_\_

Email Address \_\_\_\_\_ Password \_\_\_\_\_

Account instructions \_\_\_\_\_

----- **Funeral Information** -----

I have discussed my funeral wishes with my family:  YES or  NO

Funeral details are attached:  YES or  NO ---- Funeral details are located \_\_\_\_\_

----- **Additional Information** -----

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_