



Estate planning

Personal records organizer



Organize important information about your personal and financial affairs in one handy location

Name _____

Date _____

How to use this organizer

Use this organizer as a handy master index of your personal and financial records.

- ☐ In each section, fill in names, addresses and other key details. Include more information, or less, based on what's important to you. Then write down the location of the documents that contain additional details.
- ☐ Keep this organizer in a secure place with your other important papers. Let your family know where it is.
- ☐ Give your estate plan a yearly checkup with your advisor. (You can use our checkup form 17-8148). If you find anything's changed, update it in this organizer.

Organizing your information is an important step in your estate plan.

You can be confident your family and your executor will be able to find the information necessary to manage your affairs.

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Basic personal information

Your full legal name

Date and place of birth

Birth certificate is located

Social insurance number and location of card
(also, if applicable, U.S. social security number)

Countries of which you are a citizen

Citizenship papers, if applicable, are located

Passport(s) are located

Driver's licence is located

Marriage certificate, if applicable, is located

Divorce papers, if applicable, are located

Key contacts

Immediate family

Name	Relationship
Address	Phone
	Email

Name	Relationship
Address	Phone
	Email

Name	Relationship
Address	Phone
	Email

Name	Relationship
Address	Phone
	Email

Name	Relationship
Address	Phone
	Email

Other key contacts

You can include additional contacts at the end of this section.

Executor

Your executor is the person you name to manage your estate after you die. In Quebec, executors are called liquidators.

Name	Address
Phone, email	

Advisor

Name	Address
Phone, email	

Employer or business partner

Name	Address
Phone, email	

Lawyer

Name	Address
Phone, email	

Notary

In Quebec, some estate-related tasks are typically performed by notaries, instead of lawyers.

Name	Address
Phone, email	

Accountant

Name	Address
Phone, email	

Doctor

Name	Address
Phone, email	

Dentist

Name	Address
Phone, email	

Bank or credit union

Name	Address
Phone, email	

Stockbroker

Name	Address
Phone, email	

Trust officer

Name Address

Phone, email

Other contacts 1

Relationship

Name Address

Phone, email

Other contacts 2

Relationship

Name Address

Phone, email

Other contacts 3

Relationship

Name Address

Phone, email

Your will and powers of attorney

Do you have a will? ☐ Yes ☐ No

Date of will (when last updated)

Original document is located

A copy is located

Type of will: ☐ notarized ☐ witnessed ☐ handwritten (also called “holograph”)

Do you have a living will or power of attorney for personal care? ☐ Yes ☐ No

Your legal representative for personal care

Phone Email

Original document is located

A copy is located

Do you have a power of attorney for property? ☐ Yes ☐ No

Your legal representative for property

Phone Email

Law firm

Phone Email

Address

Original document is located

A copy is located

If in Quebec, do you have a protection mandate in case of mental incapacity? ☐ Yes ☐ No

Your legal representative

Phone Email

Law firm

Phone Email

Address

Funeral arrangements and organ donation

Have you made funeral arrangements? ☐ Yes ☐ No

Funeral home

Address

Phone

Email

Have you set out instructions for burial, cremation or funeral? ☐ Yes ☐ No

Where are these instructions written? ☐ Your will ☐ A letter

Document is located

Do you own a cemetery plot? ☐ Yes ☐ No

Plot is located

Have you provided for its ongoing care? ☐ Yes ☐ No

Deed to the plot is located

Do you want to donate your organs or body for transplant, research or education? ☐ Yes ☐ No

Where have you explained this?

☐ Will ☐ Organ donor card ☐ Driver's licence ☐ Your province's online donor registry

Taxes

Do you file your taxes yourself? ☐ Yes ☐ No

Tax advisor

Address

Phone

Email

Tax information and supporting data are located

Employers, volunteer work, military service

Most recent employer

Starting year – ending year	
Address	Phone
	Email

Employer 2

Starting year – ending year	
Address	Phone
	Email

Employer 3

Starting year – ending year	
Address	Phone
	Email

Employer 4

Starting year – ending year	
Address	Phone
	Email

Have you done volunteer work? ☐ Yes ☐ No

Organization 1

Starting year – ending year	
Address	Phone
	Email

Organization 2

Starting year – ending year	
Address	Phone
	Email

Organization 3

Starting year – ending year	
Address	Phone
	Email

Organization 4

Starting year – ending year	
Address	Phone
	Email

Have you performed military service? ☐ Yes ☐ No

Country served	Veteran's #
Discharge papers are located	

Bank, credit union accounts

Account 1

Bank, credit union	Branch
Type of account ¹	Account #
Address	Phone
	Email

Account 2

Bank, credit union	Branch
Type of account ¹	Account #
Address	Phone
	Email

Account 3

Bank, credit union	Branch
Type of account ¹	Account #
Address	Phone
	Email

Account 4

Bank, credit union	Branch
Type of account ¹	Account #
Address	Phone
	Email

Account 5

Bank, credit union	Branch
Type of account ¹	Account #
Address	Phone
	Email

Account 6

Bank, credit union	Branch
Type of account ¹	Account #
Address	Phone
	Email

¹ For example, chequing, savings.

Scheduled payments

Payment 1

Type of payment ²	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? ☐ Yes ☐ No

Payment 2

Type of payment ²	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? ☐ Yes ☐ No

Payment 3

Type of payment ²	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? ☐ Yes ☐ No

Payment 4

Type of payment ²	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? ☐ Yes ☐ No

Payment 5

Type of payment ²	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? ☐ Yes ☐ No

² For example, mortgage, rent, loan, bill.

Scheduled payments, continued

Payment 6

Type of payment ²	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? ☐ Yes ☐ No

Payment 7

Type of payment ²	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? ☐ Yes ☐ No

Payment 8

Type of payment ²	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? ☐ Yes ☐ No

Payment 9

Type of payment ²	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? ☐ Yes ☐ No

Payment 10

Type of payment ²	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? ☐ Yes ☐ No

² For example, mortgage, rent, loan, bill.

Debtors and creditors

People who owe you money

Debtor 1

Amount \$
Date of loan
Phone, email

Debtor 2

Amount \$
Date of loan
Phone, email

Debtor 3

Amount \$
Date of loan
Phone, email

People you owe money to

Creditor 1

Amount \$
Date of loan
Phone, email

Creditor 2

Amount \$
Date of loan
Phone, email

Creditor 3

Amount \$
Date of loan
Phone, email

Loan agreements and promissory notes are located

Other financial commitments and contractual obligations

Description of commitment or obligation 1

Information is located

Description of commitment or obligation 2

Information is located

Description of commitment or obligation 3

Information is located

Insurance: Life insurance

Policies you own on your own life

Policy 1

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Policy 2

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Policy 3

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Policy 4

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Policies you own on the lives of others

Policy 1

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Policy 2

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Policy 3

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Policy 4

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Policies that others own on your life

Policy 1

Policyowner	Phone or email
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Policy 2

Policyowner	Phone or email
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Policy 3

Policyowner	Phone or email
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Policy 4

Policyowner	Phone or email
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	

Group or association life insurance

Policy 1

Company or association	Policy #
Address	Phone or email
	Policy is located
Beneficiary(ies) and their phone or email	

Policy 2

Company or association	Policy #
Address	Phone or email
	Policy is located
Beneficiary(ies) and their phone or email	

Policy 3

Company or association	Policy #
Address	Phone or email
	Policy is located
Beneficiary(ies) and their phone or email	

Policy 4

Company or association	Policy #
Address	Phone or email
	Policy is located
Beneficiary(ies) and their phone or email	

Critical illness insurance

Policies you own on yourself

Policy 1

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 2

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 3

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 4

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policies you own on the health of others

Policy 1

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 2

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 3

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 4

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Disability insurance

Policies you own on yourself

Policy 1

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 2

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 3

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 4

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policies you own on the health of others

Policy 1

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 2

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 3

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Policy 4

Insured person(s)	Phone or email
Will someone else become the policyowner after you die?	
☐ Yes ☐ No Who?	
Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) other than yourself, and their phone or email	

Hospital, medical, travel and other insurance

Policy 1

Type of insurance ³	Policy #
Insurance company	Phone
Address	Email
	Policy is located

Policy 2

Type of insurance ³	Policy #
Insurance company	Phone
Address	Email
	Policy is located

Policy 3

Type of insurance ³	Policy #
Insurance company	Phone
Address	Email
	Policy is located

Policy 4

Type of insurance ³	Policy #
Insurance company	Phone
Address	Email
	Policy is located



³ For example, hospital, medical, travel.

Investments: Tax-free savings accounts (TFSAs)

TFSA 1

Financial company	Account #
Address	Phone or email
Information is located	
Individual TFSA or group TFSA? ☐ Individual ☐ Group	Company or group name?
Do you invest regularly using automatic payments?	☐ Yes ☐ No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	

TFSA 2

Financial company	Account #
Address	Phone or email
Information is located	
Individual TFSA or group TFSA? ☐ Individual ☐ Group	Company or group name?
Do you invest regularly using automatic payments?	☐ Yes ☐ No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	

TFSA 3

Financial company	Account #
Address	Phone or email
Information is located	
Individual TFSA or group TFSA? ☐ Individual ☐ Group	Company or group name?
Do you invest regularly using automatic payments?	☐ Yes ☐ No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	

TFSA 4

Financial company	Account #
Address	Phone or email
Information is located	
Individual TFSA or group TFSA? ☐ Individual ☐ Group	Company or group name?
Do you invest regularly using automatic payments?	☐ Yes ☐ No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	

Registered retirement savings plans (RRSPs)

RRSP 1

Financial company	Account #
Address	Phone or email
Information is located	
Individual RRSP or group RRSP? ☐ Individual ☐ Group Company or group name?	
Do you invest regularly using automatic payments? ☐ Yes ☐ No	
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	

RRSP 2

Financial company	Account #
Address	Phone or email
Information is located	
Individual RRSP or group RRSP? ☐ Individual ☐ Group Company or group name?	
Do you invest regularly using automatic payments? ☐ Yes ☐ No	
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	

RRSP 3

Financial company	Account #
Address	Phone or email
Information is located	
Individual RRSP or group RRSP? ☐ Individual ☐ Group Company or group name?	
Do you invest regularly using automatic payments? ☐ Yes ☐ No	
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	

RRSP 4

Financial company	Account #
Address	Phone or email
Information is located	
Individual RRSP or group RRSP? ☐ Individual ☐ Group Company or group name?	
Do you invest regularly using automatic payments? ☐ Yes ☐ No	
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	

Deferred profit-sharing plans

Plan 1

Company with plan	Account #
Address	Phone or email
	Information is located
Financial company	
Address	Phone or email
Beneficiary(ies) and their phone or email	

Plan 2

Company with plan	Account #
Address	Phone or email
	Information is located
Financial company	
Address	Phone or email
Beneficiary(ies) and their phone or email	

Plan 3

Company with plan	Account #
Address	Phone or email
	Information is located
Financial company	
Address	Phone or email
Beneficiary(ies) and their phone or email	

Plan 4

Company with plan	Account #
Address	Phone or email
	Information is located
Financial company	
Address	Phone or email
Beneficiary(ies) and their phone or email	

Registered education savings plans (RESPs)

RESP 1

Financial company	Account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Type of RESP? ☐ Individual ☐ Family ☐ Group	Company or group name?
Do you invest regularly using automatic payments?	☐ Yes ☐ No
How often?	What account is payment made from?
Student beneficiary(ies) and their phone or email	

RESP 2

Financial company	Account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Type of RESP? ☐ Individual ☐ Family ☐ Group	Company or group name?
Do you invest regularly using automatic payments?	☐ Yes ☐ No
How often?	What account is payment made from?
Student beneficiary(ies) and their phone or email	

RESP 3

Financial company	Account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Type of RESP? ☐ Individual ☐ Family ☐ Group	Company or group name?
Do you invest regularly using automatic payments?	☐ Yes ☐ No
How often?	What account is payment made from?
Student beneficiary(ies) and their phone or email	

RESP 4

Financial company	Account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Type of RESP? ☐ Individual ☐ Family ☐ Group	Company or group name?
Do you invest regularly using automatic payments?	☐ Yes ☐ No
How often?	What account is payment made from?
Student beneficiary(ies) and their phone or email	

Registered retirement income funds (RRIFs) and annuities

RRIF or annuity 1

Financial company	Policy or account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Do you receive income?	☐ Yes ☐ No
How often?	Where is it deposited?
Beneficiary(ies) and their phone or email	

RRIF or annuity 2

Financial company	Policy or account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Do you receive income?	☐ Yes ☐ No
How often?	Where is it deposited?
Beneficiary(ies) and their phone or email	

RRIF or annuity 3

Financial company	Policy or account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Do you receive income?	☐ Yes ☐ No
How often?	Where is it deposited?
Beneficiary(ies) and their phone or email	

RRIF or annuity 4

Financial company	Policy or account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Do you receive income?	☐ Yes ☐ No
How often?	Where is it deposited?
Beneficiary(ies) and their phone or email	

Pension plans

Pension plan 1

Plan or policy #	Information is located
Company with plan	Phone or email
Address	
Financial company	Phone or email
Address	
Type of plan: ☐ Defined benefit ☐ Defined contribution ☐ Hybrid or other	
Name of spouse when pension began, if applicable	Phone or email
Beneficiary(ies) and their phone or email	

Pension plan 2

Plan or policy #	Information is located
Company with plan	Phone or email
Address	
Financial company	Phone or email
Address	
Type of plan: ☐ Defined benefit ☐ Defined contribution ☐ Hybrid or other	
Name of spouse when pension began, if applicable	Phone or email
Beneficiary(ies) and their phone or email	

Pension plan 3

Plan or policy #	Information is located
Company with plan	Phone or email
Address	
Financial company	Phone or email
Address	
Type of plan: ☐ Defined benefit ☐ Defined contribution ☐ Hybrid or other	
Name of spouse when pension began, if applicable	Phone or email
Beneficiary(ies) and their phone or email	

Government bonds

Government bonds 1

Type of bond⁴:

Payable to bearer? ☐ Yes ☐ No Who has the bond?

Registered in your name? ☐ Yes ☐ No Co-registered with

Serial #s

Bonds are located

Government bonds 2

Type of bond⁴:

Payable to bearer? ☐ Yes ☐ No Who has the bond?

Registered in your name? ☐ Yes ☐ No Co-registered with

Serial #s

Bonds are located

Government bonds 3

Type of bond⁴:

Payable to bearer? ☐ Yes ☐ No Who has the bond?

Registered in your name? ☐ Yes ☐ No Co-registered with

Serial #s

Bonds are located

Government bonds 4

Type of bond⁴:

Payable to bearer? ☐ Yes ☐ No Who has the bond?

Registered in your name? ☐ Yes ☐ No Co-registered with

Serial #s

Bonds are located

⁴ For example, federal, provincial, municipal, Canada savings bond, treasury bill.

Securities: Stocks and non-government bonds

Securities 1

Description	Information is located
A gift or from inheritance? ☐ Yes ☐ No	
Collateral for a loan? ☐ Yes ☐ No	
Lender	
Address	Phone
	Email

Securities 2

Description	Information is located
A gift or from inheritance? ☐ Yes ☐ No	
Collateral for a loan? ☐ Yes ☐ No	
Lender	
Address	Phone
	Email

Securities 3

Description	Information is located
A gift or from inheritance? ☐ Yes ☐ No	
Collateral for a loan? ☐ Yes ☐ No	
Lender	
Address	Phone
	Email

Securities 4

Description	Information is located
A gift or from inheritance? ☐ Yes ☐ No	
Collateral for a loan? ☐ Yes ☐ No	
Lender	
Address	Phone
	Email

Non-registered accounts

Non-registered account 1

Type of investment ⁵	Account #
Financial company	Phone or email
Address	Information is located
Advisor who services account	Phone or email
Beneficiary(ies), if any, and their phone or email	

Non-registered account 2

Type of investment ⁵	Account #
Financial company	Phone or email
Address	Information is located
Advisor who services account	Phone or email
Beneficiary(ies), if any, and their phone or email	

Non-registered account 3

Type of investment ⁵	Account #
Financial company	Phone or email
Address	Information is located
Advisor who services account	Phone or email
Beneficiary(ies), if any, and their phone or email	

Non-registered account 4

Type of investment ⁵	Account #
Financial company	Phone or email
Address	Information is located
Advisor who services account	Phone or email
Beneficiary(ies), if any, and their phone or email	

⁵ For example, segregated funds, mutual funds, government bonds, securities.

Home and real estate

Property 1

Address	Type of real estate ⁶
Title is held by ☐ You ☐ Spouse ☐ Joint	
Is there a mortgage? ☐ Yes ☐ No	
Mortgage held by	Phone or email
Address	

Property 2

Address	Type of real estate ⁶
Title is held by ☐ You ☐ Spouse ☐ Joint	
Is there a mortgage? ☐ Yes ☐ No	
Mortgage held by	Phone or email
Address	

Property 3

Address	Type of real estate ⁶
Title is held by ☐ You ☐ Spouse ☐ Joint	
Is there a mortgage? ☐ Yes ☐ No	
Mortgage held by	Phone or email
Address	

Property 4

Address	Type of real estate ⁶
Title is held by ☐ You ☐ Spouse ☐ Joint	
Is there a mortgage? ☐ Yes ☐ No	
Mortgage held by	Phone or email
Address	

Property 5

Address	Type of real estate ⁶
Title is held by ☐ You ☐ Spouse ☐ Joint	
Is there a mortgage? ☐ Yes ☐ No	
Mortgage held by	Phone or email
Address	

Deeds are located

Copies of mortgages are located

Property insurance policies are located

Land surveys are located

Property tax receipts are located

Leases are located

Information on building costs is located

⁶ For example, house, condo, vacation home.

Personal property

List of vehicles you own or lease

Vehicle registrations are located

Vehicles' bills of sale or lease and insurance policies are located

Jewelry, stamp collections, coin collections and other valuables are located

Are household furnishings insured? ☐ Yes ☐ No

Furnishings' bills of sale and insurance policies, and list of items in your home, are located

Safe deposit box

Do you have a safe deposit box? ☐ Yes ☐ No

Box is located

Names of others who have access to it

Keys are located

List of contents is located



Email, social media, digital assets

Your digital assets include online accounts, electronic files and data.
If information on these assets is available somewhere else, please note the location below.

Do you have an online password manager for your digital assets? ☐ Yes ☐ No

Company	Account # or user ID	Password
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Is information on your digital assets available somewhere else? ☐ Yes ☐ No

Information is located

Email accounts

Email address	Password
Email address	Password
Email address	Password
Email address	Password

Social media accounts

Company	User ID	Password
Company	User ID	Password
Company	User ID	Password
Company	User ID	Password
Company	User ID	Password
Company	User ID	Password
Company	User ID	Password

Other online accounts

For example, CRA, PayPal, Bitcoin, data storage, photos.

Company	Type of account	Account #
User ID	Password	

Company	Type of account	Account #
User ID	Password	

Company	Type of account	Account #
User ID	Password	

Company	Type of account	Account #
User ID	Password	

Company	Type of account	Account #
User ID	Password	

Company	Type of account	Account #
User ID	Password	

Charitable gifts

Charity 1	Information is located
Address	Phone or email
Charity 2	Information is located
Address	Phone or email
Charity 3	Information is located
Address	Phone or email
Charity 4	Information is located
Address	Phone or email

Trust funds

Purpose of trust 1	
Agreement was drawn up by	
Trust papers are located	Phone or email
Purpose of trust 2	
Agreement was drawn up by	
Trust papers are located	Phone or email
Purpose of trust 3	
Agreement was drawn up by	
Trust papers are located	Phone or email
Purpose of trust 4	
Agreement was drawn up by	
Trust papers are located	Phone or email

Memberships

Club or association 1

Address	Phone
	Email

Club or association 2

Address	Phone
	Email

Club or association 3

Address	Phone
	Email

Club or association 4

Address	Phone
	Email

Subscriptions

Publication 1

Address	Phone
	Email

Publication 2

Address	Phone
	Email

Publication 3

Address	Phone
	Email

Publication 4

Address	Phone
	Email

Notes



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17-8125-10/20