



## ESTATE PLANNING

Name: \_\_\_\_\_ SIN(s): \_\_\_\_\_  
Date: \_\_\_\_\_

### *Here is where you will find...*

Our Will(s): _____	Safety Deposit Box: _____
Executor(s): _____	Key: _____
Life Insurance Policies: _____	Income Tax Records: _____
Group Insurance: _____	Property Tax Records: _____
Property Insurance: _____	Property Deeds: _____
Other Insurance: _____	Savings Accounts: _____
RRSPs: _____	Account # _____
RRIFs/Annuities: _____	Chequing Accounts: _____
Non-Registered Funds: _____	Account # _____
Pension Plan Information: _____	Credit Cards: _____
CPP/OAS: _____	Personal Loan Documents: _____
Investment Certificates: _____	Other Important Records: _____
Common Shares: _____	Passports: _____
Other Investments: _____	Birth Certificates: _____
Mortgage Documents: _____	Marriage Certificate: _____

### *Advisors to contact...*

Financial Planner: _____	Lawyer: _____
Phone: _____	Phone: _____
Accountant: _____	Business Associates: _____
Phone: _____	Phone: _____

***Important Information:*** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_