

Please use this organizer as a central repository of important information regarding your financial and other personal affairs. This could be used in the event of serious illness, injury or death by you, your family and advisors. Completing this easy to use document will give you peace of mind your family and advisors will be able to easily gather and administer your affairs by locating important documents, financial assets and liabilities. We suggest that upon completion, you keep a copy of this document with your Will in a safe place such as a safety deposit box and with an advisor such as your accountant or solicitor. No matter how simple or complicated your affairs are, everyone should complete this document.

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## Personal Details

Date Completed:	
Location(s) of PAO:	
Name:	
Social Insurance:	
Date of Birth:	
Address:	
Spouse:	
Social Insurance:	
Date of Birth:	
Address:	
Child:	
Date of Birth:	
Address:	
Child:	
Date of Birth:	
Address:	
Child:	
Date of Birth:	
Address:	

## Professional Advisors & Other Contacts

Lawyer:	
Address:	
Telephone:	
Accountant:	
Address:	
Telephone:	
Investment Advisor:	
Address:	
Telephone:	
Insurance Agent (Life and Health):	
Address:	
Telephone:	
Insurance Agent (Property and Casualty)	
Address:	
Telephone:	
Medical Doctor:	
Address:	
Telephone:	
Other Medical:	
Address:	
Telephone:	
Clergy:	
Address:	
Telephone:	
Family:	
Address:	
Telephone:	
Family:	
Address:	
Telephone:	
Friend:	
Address:	
Telephone:	
Friend:	
Address:	
Telephone:	

### **Important Documents Locator:**

Will:	
Secondary Will:	
Living Will	
Power of Attorney:	
Trust Documents:	
Birth Certificate:	
Marriage Certificate:	
Tax Returns:	

### **Funeral Arrangements**

Funeral Home:	
Pre-arranged Funeral Details:	
Pre-paid funeral Contract:	
Cemetery:	

# Assets

## Non-retirement Financial Assets

### Banks, Trust Company & Credit Union Deposits

Institution	Address	Account #	Account Type & Description	Account Holder Names

### Investment Accounts

Institution	Address	Account #	Account Type & Description	Account Holder Names

### Other – Private Company Shares, Partnerships, Personal Loans, Personal Trusts

Item	Location	Description and other Details

### Retirement Financial Assets: RPP's, RRSP's, RRIF, LIRA, LIF, Annuities

Institution	Address	Account #	Account Type & Description	Beneficiaries

### Real Property – Residence, Vacation, Investment and Other

Property	Address	Co-owners	Encumbrances	Location of Pertinent Documents

### Other Assets – Artwork, Jewelry, Collectibles and Other

Item	Location	Description and other Details

## Liabilities

### *Mortgages*

Property	Address	Creditor	Terms	Location of Documents

### *Personal Line of Credit*

Institution	Address	Description	Account #	Security

### *Investment Loans*

Institution	Address	Description	Account #	Security

### *Credit Cards*

Institution	Description	Account #	Co-owners	Points Program

### *Personal Loans*

Creditor	Address	Description	Co-owners	Security

## Insurance

### *Life Insurance – Term, Whole Life, Universal Life*

Institution	Address	Description	Policy #	Beneficiaries	Agent

### *Critical Illness*

Institution	Address	Description	Policy #	Agent

### *Disability*

Institution	Address	Description	Policy #	Agent

### *Health*

Institution	Address	Description	Policy #	Agent

### *Property and Casualty*

Institution	Address	Description	Policy #	Agent

## Activities and Memberships

### *Employment, Directorships, Charitable Organizations, Professional Associations, Trade Unions, Sports Clubs, Religious Organizations, Other*

Organization	Address	Activity	Relationship	Contact

## Computers, Software and Online Activities

### *Hardware*

Item	Location/Serial #	Activity/Software/Files	Passwords

### *Applications and Subscriptions*

Item	Location	Description	Passwords

### *Online Activity – Banking, Investing, Social Networking, Email, Other*

Item	Location	Description	Passwords

### **Other Important Information**
