
INFORMATION ABOUT MY ESTATE



for my Executor

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Information About Me

This section of the binder is to assist you in leaving as much information for the executor of your estate as possible.

Enter as much information as you can on these pages and try to keep it updated.

Important Papers

This section of the binder can be used to store a copy of your will, birth certificate, social insurance card etc. (anything you feel may be of value in gathering the information about your estate).

Personal Articles

Use this section if there are items of relatively low value that you would like your executor to distribute to particular individuals.

Bequests of significant value should be included in your will, to be binding on your executor and other beneficiaries.

Letters & Notes

This section of the binder can be used to leave letters or messages to your loved ones (or in the case of my parents, their pet).

Business Cards

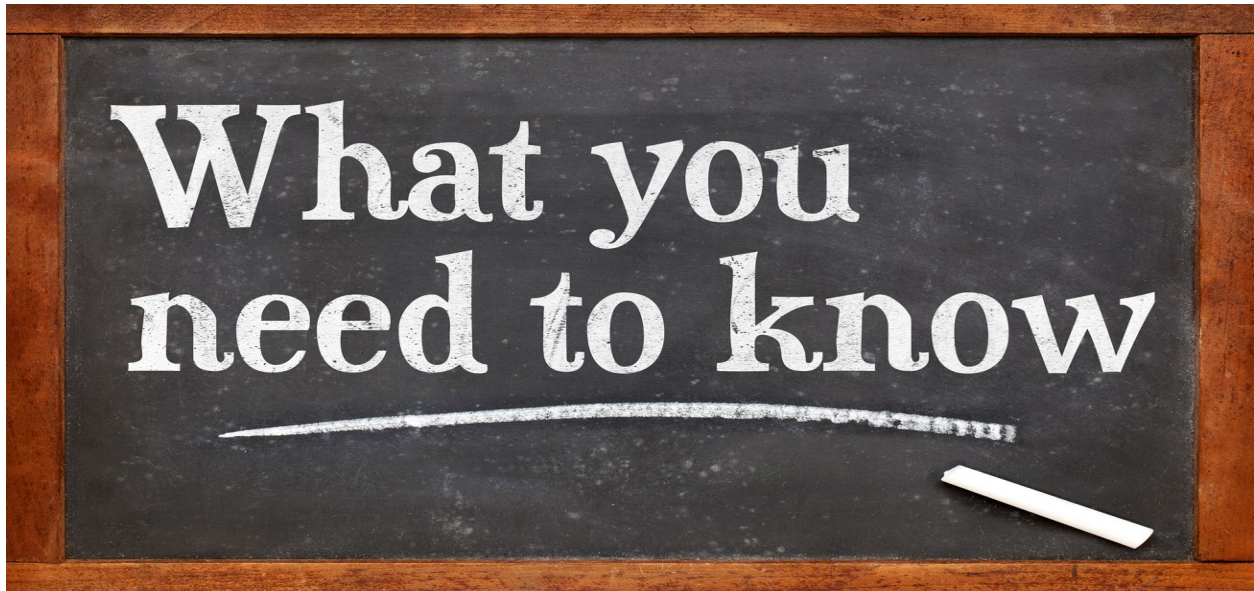
Use this section to hold any business cards that you may have from various banks, insurance companies etc.

Passwords

For security purposes, we recommend not leaving your passwords in this binder, which you are likely to keep in an easily discovered place in your home. We do recommend that you maintain a list of passwords in a secret place (or app), and that you make sure your Executor has access to your passwords.

this section (tab) is for:

INFORMATION ABOUT ME



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Introduction

This section was created to assist you with leaving information for your executor to make their job as easy as possible.

If you run out of room in one of the sections, you can use the notes at the back of the guide.

If you would prefer an electronic format of this book, email info@hlaw.ca to request a fillable PDF.

My Personal Information

My name			
My address			
Phone number			
Email address			
Date of Birth		City of Birth	
My SIN		My Citizenship	
Other Information			

My Spouse's Information

Spouse's Name			
Phone number			
Email address			
Date of Birth		City of Birth	
Spouse's SIN		Spouse's Citizenship	
Other Information			

My Children – include all your children. If deceased, then include their children (your grandchildren)

Full Name			
Address			
Phone number			
Email address			
Relationship		Birthdate	
Surviving/Predeceased		Other Information	
Full Name			
Address			
Phone number			
Email address			
Relationship		Birthdate	
Surviving/Predeceased		Other Information	
Full Name			
Address			
Phone number			
Email address			
Relationship		Birthdate	
Surviving/Predeceased		Other Information	
Full Name			
Address			
Phone number			
Email address			
Relationship		Birthdate	
Surviving/Predeceased		Other Information	
Full Name			
Address			
Phone number			
Email address			
Relationship		Birthdate	
Surviving/Predeceased		Other Information	

My Parents & Siblings – if a sibling is deceased, then include their children.

Full Name			
Address			
Phone number			
Email address			
Relationship		Birthdate	
Surviving/Predeceased		Other Information	
Full Name			
Address			
Phone number			
Email address			
Relationship		Birthdate	
Surviving/Predeceased		Other Information	
Full Name			
Address			
Phone number			
Email address			
Relationship		Birthdate	
Surviving/Predeceased		Other Information	
Full Name			
Address			
Phone number			
Email address			
Relationship		Birthdate	
Surviving/Predeceased		Other Information	
Full Name			
Address			
Phone number			
Email address			
Relationship		Birthdate	
Surviving/Predeceased		Other Information	

My Friends – Include anyone you would want your Executor to communicate with

Name	
Phone number	
Email address	
Name	
Phone number	
Email address	
Name	
Phone number	
Email address	
Name	
Phone number	
Email address	
Name	
Phone number	
Email address	
Name	
Phone number	
Email address	

My Pets

Name	
Vet name	
Contact info.	
Guardian	
Other Info.	
Name	
Vet name	
Contact info.	
Guardian	
Other Info.	

My Home

Address		
Mortgage company & branch		
Mortgage reference number (if known)		
Is Mortgage Life Insured?		
Mailbox / Storage Locker location & number		
Strata Management Company (if any)		
Other Info.		

My Rental Property

Address		
Tenant Names		
Tenant Contact		
Monthly Rental		
Damage Deposit and Date Paid		
Location of Lease Agreement		
Location of Keys		
Mortgage company & reference number		
Mailbox / Storage Locker location & number		
Strata Management Company (if any)		
Other Info.		

My Recreational Property

Address		
Mortgage company & reference number		
Mailbox / Storage Locker location & number		
Strata Management Company (if any)		
Other Info.		

My Banks

Bank name & branch	
Contact name (if any)	
Phone number	
Email address	
Other Info.	
Bank name & branch	
Contact name (if any)	
Phone number	
Email address	
Other Info.	
Bank name & branch	
Contact name (if any)	
Phone number	
Email address	
Other Info.	
Bank name & branch	
Contact name (if any)	
Phone number	
Email address	
Other Info.	

My Safety Deposit Box

Bank name & branch	
Location of Key	
Other Info.	

My Investments

Company & address			
Contact name (if any)			
Phone number			
Email address			
Investment Type Ie: TFSA; RESP; RRSP; RRIF; Unregistered; SEG		Beneficiary (if any)	
		Beneficiary (if any)	
		Beneficiary (if any)	
		Beneficiary (if any)	
Other Info.			
Company & address			
Contact name (if any)			
Phone number			
Email address			
Investment Type Ie: TFSA; RESP; RRSP; RRIF; Unregistered; SEG		Beneficiary (if any)	
		Beneficiary (if any)	
		Beneficiary (if any)	
		Beneficiary (if any)	
Other Info.			

My Companies

Name of Company	
Records office	
Accountant	
Other Info.	
Name of Company	
Records office	
Accountant	
Other Info.	

My Vehicles & Recreation Vehicles – make / model / year for all cars, boats trailers etc.

Vehicle Description			
VIN #		Approximate Value	
Vehicle Description			
VIN #		Approximate Value	
Boat Description			
VIN #		Approximate Value	
Trailer Description			
VIN #		Approximate Value	
Other Description			
VIN #		Approximate Value	
Other Description			
VIN #		Approximate Value	

My Other Assets

- list tangible assets that you want your executor to be aware of such as an expensive painting or specific pieces of jewelry.

Other Asset			
Location		Approximate Value	
Other Information			
Other Asset			
Location		Approximate Value	
Other Information			
Other Asset			
Location		Approximate Value	
Other Information			
Other Asset			
Location		Approximate Value	
Other Information			
Other Asset			
Location		Approximate Value	
Other Information			

My Debts

Line of Credit

Account Number

Credit Card

Account Number

Credit Card

Account Number

Credit Card

Account Number

Credit Card

Account Number

Other Debt

My Insurance

Life Insurance

Contact Info.

Policy number

Beneficiary?

Other Info.

Home Insurance

Contact Info.

Other Info.

Car Insurance

Contact Info.

Other Info.

Other Insurance

Contact Info.

Other Info.

My Employment / Pension Information

Employer

Contact

Pension Plan

Beneficiary?

Other Info.

My Legal Documents

Will dated

Will location

Codicil dated

Codicil location

Other Info.

My Final Wishes

Enter your burial and funeral wishes here.

Do you want a big party, a quiet affair with just family, etc. etc.

Do you want to be buried or cremated. If cremated, do you want your ashes spread or buried or kept in an urn.

If you have pre-arranged your funeral plans enter the name and contact information of the funeral home.

Notes & Other Information



this section (tab) is for:

IMPORTANT PAPERS



This section of the binder can be used to store a copy of your will, birth certificate, social insurance card etc. (anything you feel may be of value in gathering the information about your estate).

this section (tab) is for:

PERSONAL ARTICLES



Use this section if there are items of relatively low value that you would like your executor to distribute to particular individuals.

Bequests of significant value should be included in your will, to be binding on your executor and other beneficiaries.

Personal Articles

The items listed here are of relatively low value, and it is my wish that they be distributed as I've noted below.

[illegible]

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LETTERS & NOTES



This section of the binder can be used to leave letters or messages to your loved ones (or in the case of my parents, their dog).

this section (tab) is for:

BUSINESS CARDS



Use this section to hold any business cards that you may have from various banks, insurance companies etc.