

## Personal Information

Contacts/Information/Location of documents

Birth certificate

Social Insurance Number

Military service records

Driver's licence

Passport/Citizenship papers

Marriage Licence

Divorce records

Death certificate (for deceased spouse)

Will

Executor/Trustee

Pre-arranged funeral and insurance

Cemetery plot

Pets/Veterinarian

## Other Important Documents

Contacts/Information/Location of documents

Pre- or post-nuptial agreements

Power of Attorney

(See helpful resources at the end)

Custody papers

Business owner information

## Financial Information and Assets

Contacts/Information/Location of documents

Bank account(s)

Investments

(for example, RRSPs, ETFs, stocks,  
mutual funds, bonds)

Debt

(credit card/lines of credit)

Life insurance policy

Pension(s)/Benefits

Safe deposit box(es)

Location of personal items or keepsakes  
(especially those identified in the will)

Previous year's tax returns

## Financial Contacts

Name and contact information

Financial planner and advisor

Accountant

Lawyer

Life insurance agent

## Home and Other Properties

Contacts/Information/Location of documents

List of all properties

Mortgage or rental documents

Utility bills

(list providers and account numbers  
for power, cable, phone, internet,  
water/sewer, etc.)

Homeowners or tenants insurance policy

Property tax bill(s)

Deeds/Titles for properties

## Automobile and Recreational Vehicles

Contacts/Information/Location of documents

Registration  
(list all vehicles)

Loans/Financing

Insurance

## Health Information

Contacts/Information/Location of documents

Name of doctor(s)

Medications

Medicare number

Medical records

Health insurance

Disability Insurance

**Notes**

## Notes

### Additional resources:

Estate Planning

[finances50plus.fcnb.ca](https://finances50plus.fcnb.ca)

Documents and worksheets

[fcnb.ca/en/online-services/resources](https://fcnb.ca/en/online-services/resources)