



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

Additional resources:

Estate Planning

finances50plus.fcnb.ca

Documents and worksheets

fcnbc.ca/en/online-services/resources

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