

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
