Estate Planning Inventory

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Well Into the Future

Estate Planning Inventory

The Estate Planning Inventory has been created to provide you with a guide to organizing important personal and financial information. It is a useful stepping stone in the development of a complete Estate Plan. You may also find it opens up important conversations that haven't yet occurred with your loved ones, or motivates you to complete items that you have been meaning to get done.

In any event, completing this Estate Planning Inventory will provide your loved ones and executor with a valuable source of information.

Personal Information

Self

Legal Name		Maiden Name	
Primary Address			
Home Phone		Cell Phone	
DOB (mm/dd/yy)		S.I.N.	
Place of Birth			

Spouse

Legal Name		Maiden Name	
Primary Address			
Home Phone		Cell Phone	
DOB (mm/dd/yy)		S.I.N.	
Place of Birth			

Children/Dependants

Name		Relationship	
DOB (mm/dd/yy)		S.I.N.	
Place of Birth			
Name		Relationship	
DOB (mm/dd/yy)		S.I.N.	
Place of Birth			
Name		Relationship	
DOB (mm/dd/yy)		S.I.N.	
Place of Birth			
Name		Relationship	
DOB (mm/dd/yy)		S.I.N.	
Place of Birth			

Location of Documents

	Location
Safety Deposit Box	
Safety Deposit Box Keys	
Will (Original/Copy)	
Power of Attorney	
Personal Directive for Health Care	
Birth Certificate	
Spouse's Birth Certificate	
Children's Birth Certificates	
Custody/Adoption Papers	
Marriage License	
Prenuptial/Cohabitation Papers	
Separation/Divorce Papers	
Passport	
Citizenship Documents	
Driver's License	
Social Insurance Card	
Home Keys (spare)	
Car Keys (spare)	
Investment Statements	
Bank Statements	
Mortgage/Loan Documents	
Insurance Documents	
Real Estate Titles	
Income Tax Returns	
Trust Documents	

Key Data

Will

Execution Date		Update	
Lawyer			
Executor			

Power of Attorney

Execution Date		Update	
Powers Given To			
Phone Number			
Lawyer			

Personal Directive for Health Care

Execution Date		Update	
Powers Given To			
Phone Number			
Lawyer			

Trust

Type of Trust	
Prepared By	
Trust For	
Trustee(s)	
Beneficiary(ies)	

Professional Advisors

	Name	Firm Name	Phone	Email
Lawyer				
Accountant				
Portfolio Manager				
Insurance Agent				
Personal Banker				

Banking

Primary Financial Institution	
Location	
Type(s) of Accounts i.e. savings, chequing	
Financial Institution	
Location	
Type(s) of Accounts i.e. savings, chequing	
Other Lines of Credit, Mortgages, Demand Loans	

Cards—Credit/Debit/Reward (i.e. RBC Visa/TD debit card/Air Miles collector card)

Card Type	Number to Call to Cancel (toll-free on back of card)	Card Type	Number to Call to Cancel (toll-free on back of card)

Investments (Include taxable accounts, RSP's, RIF's, Locked in RSP's, LIF's, RESP's, TFSA's, Annuities)

Financial Institution	
Address	
Phone	
Portfolio Manager	
Name(s) on Account	
Account Number(s) & Type(s)	

Financial Institution	
Address	
Phone	
Portfolio Manager	
Name(s) on Account	
Account Number(s) & Type(s)	

Financial Institution	
Address	
Phone	
Portfolio Manager	
Name(s) on Account	
Account Number(s) & Type(s)	

Pension Plan (Other than CPP or OAS)		
Company Name		Phone
Contact		
Plan Number		

Insurance Individual or Group Coverage (Life, Disability, Critical Illness, Mortgage etc.)

Insurance Type		
Policy Number	Coverage Amount	
Insurer	Phone	
Broker	Phone	
Name(s) on Policy		

Insurance Type		
Policy Number	Coverage Amount	
Insurer	Phone	
Broker	Phone	
Name(s) on Policy		

Insurance Type		
Policy Number	Coverage Amount	
Insurer	Phone	
Broker	Phone	
Name(s) on Policy		

Real Estate

Property Description			
Name(s) on Title			
Purchase Price		Date Purchased	
Appraised Value		Date Appraised	

Property Description			
Name(s) on Title			
Purchase Price		Date Purchased	
Appraised Value		Date Appraised	

Medical Information

Self

Organ Donor*	☐ yes ☐ no
Health Card #	
Health Insurance Provider	
Policy Number	
Doctor	

Medical Conditions

Spouse

Organ Donor*	☐ yes ☐ no
Health Card #	
Health Insurance Provider	
Policy Number	
Doctor	

Medical Conditions

Funeral Arrangements

Funeral Home	Phone

* BC—Register at transplant.bc.ca
AB—Sign the back of your Alberta Personal Health Card and discuss your wishes with your family
SK—Place your orange sticker on your Saskatchewan Health Services Card and discuss your wishes with your family
Or go to www.transplant.ca to download the brochure and donor authorization information to carry in your wallet.

Household Inventory
Personal Assets of Real or Sentimental Value

Item	Approximate Value	Location

Storage Locker ☐ yes ☐ no

Location | Keys

The Digital World

As the digital world becomes more engrained in ones daily life, it is prudent to think through a digital estate plan. What will happen to your digital assets if you are to die or become incapacitated? There are currently no standard laws regarding digital property rights and there are large differences in the rules of online service providers such as Facebook, Google etc.

Currently, access to digital assets is equivalent to controlling them. Digital assets may “vanish” after your death if no one can access them.

Please use the following questions as a guide to designing a plan to protect your digital assets.

- Do you have irreplaceable family photos stored on Flickr.com or equivalent?
- Do you receive important financial information or notifications exclusively by email?
- Do you have online accounts (other than financial institutions) that have cash or valuable balances? i.e. PayPal, iTunes, Aeroplan or Air Miles?
- Do you have digital files stored on computer servers owned by service providers (the “cloud”)
- Do you have a library of songs, videos, eBooks etc. online?
- Do you have a website that generates income through advertising?

Understand that your executor has a legal duty to collect and protect all your financial assets, including digital assets that have current or future monetary value.

Please use the space below to identify your digital assets, give instructions to your executor as to how to deal with each digital asset, and how to access your digital assets. There are online applications that offer encrypted space to store passwords and other account access information to give to executors/designated beneficiaries after a user dies.

Completed by: | Date:

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