

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)

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Investments

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

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Debt (credit card/lines of credit)

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Life insurance policy

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Pension(s)/Benefits

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Safe deposit box(es)

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Location of personal items or keepsakes

(especially those identified in the will)

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Previous year's tax returns

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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)

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Loans/Financing

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Insurance

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Health Information

Contacts/Information/Location of documents

Name of doctor(s)

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Medications

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Medicare number

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Medical records

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Health insurance

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Disability Insurance

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Notes

Additional resources:

Financial resources for seniors

www.fcnb.ca/seniors

Estate Planning

www.fcnb.ca/estate

Documents and worksheets

www.fcnb.ca/resources

(documents listed under “For Seniors”)

