

# INFORMATION FOR MY FAMILY, ATTORNEY, EXECUTOR AND TRUSTEE

Name:

Date:

This document is provided by Robins Appleby LLP for the purpose of recording information that may assist family members and personal representatives upon the incapacity and/or death of the user. The use of this document does not create a lawyer-client relationship with Robins Appleby LLP, nor does it constitute legal advice. Robins Appleby LLP does not assume any liability relating to this document or its contents.

**THIS DOCUMENT IS NOT A TESTAMENTARY DOCUMENT.**

# Information for my Family, Attorney, Executor and Trustee

## INITIAL MATTERS

My full name(s):

Also known as:

Date of Birth:

Pre-Paid Funeral Details/Arrangements

Special Instructions regarding my minor children  
(or attach separate document):

Citizenship(s): (1)

(2)

Occupation:

Social Insurance Number (SIN): - - -

Location and Date of Last Will:

Location of Memorandum of Wishes:

Location and Date of Powers of Attorney:

Location of any Compensation Agreement(s):

Location of Family Trust(s) Documentation:

I am an Executor of the

Estate. The details are as follows:

My co-executor(s), if any, is:

( )

The Estate Lawyer is:

( )

## CONTACTS

Lawyer:

Accountant: ( )

Financial Advisor: ( )

Life Insurance

Broker: ( )

Property/Vehicle

Insurance Broker: ( )

Key Business

Contact: ( )

Key Family

Contact: ( )

Family Physician: ( )

Other Medical

Practitioner: ( )

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**LIFE INSURANCE**  
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Name of Institution:

Contact Name:

Type of Plan:

(     )

Policy#

Owner(s):

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Name of Institution:

Contact Name:

Type of Plan:

(     )

Policy#

Owner(s):

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**REAL ESTATE (if rental - include tenant/lease info)**  
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Address:

Mortgage:

Title Registered to:

Type of Ownership:  
(ie. Joint, Tenants-In-Common)

Use (ie. residence, cottage, rental etc.):

-----  
Address:

Mortgage:

Title Registered to:

Type of Ownership:  
(ie. Joint, Tenants-In-Common)

Use (ie. residence, cottage, rental etc.):

-----  
Address:

Mortgage:

Title Registered to:

Type of Ownership:  
(ie. Joint, Tenants-In-Common)

Use (ie. residence, cottage, rental etc.):

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**BANK ACCOUNTS**  
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Name of Institution:

Contact Name:

(     )

Type of Account:

Account #

Type of Ownership:  
(ie. Joint, Tenants-In-Common)

Joint Owner (if any):

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Name of Institution:

Contact Name:

( )

Type of Account:

Account #

Type of Ownership:

Joint Owner (if any):

(ie. Joint, Tenants-In-Common)

-----  
Name of Institution:

Contact Name:

( )

Type of Account:

Account #

Type of Ownership:

Joint Owner (if any):

(ie. Joint, Tenants-In-Common)

-----  
Name of Institution:

Contact Name:

( )

Type of Account:

Account #

Type of Ownership:

Joint Owner (if any):

(ie. Joint, Tenants-In-Common)

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**REGISTERED ACCOUNTS / PENSIONS / ANNUITIES / RESPs**  
-----

Name of Institution:

Contact Name:

( )

Type of Account:

Account #

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Name of Institution:

Contact Name:

( )

Type of Account:

Account #

-----  
Name of Institution:

Contact Name:

( )

Type of Account:

Account #

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**OTHER ASSETS (Foreign Assets, Loans Rec., Rental Income, Support, Travel Rewards etc.)**  
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(1)

(2)

(3)

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**SAFETY DEPOSIT BOX**  
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Location: ( ) Box #:

Contents: Joint Owner(s):

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**BUSINESS ASSETS (Family Business, Partnerships, etc.)**  
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Business Name: Registered Address:

Offices Held: Agreements:

Main Contact:

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Business Name: Registered Address:

Offices Held: Agreements:

Main Contact:

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**MONTHLY BILLS/REGULAR PAYMENTS**  
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Type (ie. mortgage/hydro, Recipient:  
loan etc.):

Account #: Amount:

How Paid:

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Type (ie. mortgage/hydro, Recipient:  
loan etc.):

Account #: Amount:

How Paid:

-----  
Type (ie. mortgage/hydro, Recipient:  
loan etc.):

Account #: Amount:

How Paid:

-----  
Type (ie. mortgage/hydro, Recipient:  
loan etc.):

Account #: Amount:

How Paid:

-----  
Type (ie. mortgage/hydro,  
loan etc.):

Recipient:

Account #:

Amount:

How Paid:

-----

Type (ie. mortgage/hydro,  
loan etc.):

Recipient:

Account #:

Amount:

How Paid:

-----

OTHER:

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**DEBTS/LIABILITIES (ie. credit cards, loans, line of credit)**

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(1)

(2)

(3)

(4)

(5)

(6)

(7)

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**PASSWORDS / USERNAMES / PINs**

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On-Line Banking Password:

Username:

PIN:

Website Details:

Computer Password:

Username:

Email Address:

Password:

Cell Phone Password:

Additional info:

Facebook Password:

Username:

Twitter Password:

Username:

LinkedIn Password:

Username:

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Website Username: Password:

Website Username: Password:

Website Username: Password:

Mother's Maiden Name:

Q&A to Security Question:

Q&A to Security Question:

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**LOCATION OF OTHER IMPORTANT DOCUMENTS**  
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Pre-Paid Funeral Policies:

Compensation Agreement:

Birth Certificate:

Passport(s):

Marriage Certificate:

Domestic Contracts: (1) (2)

Divorce Judgment:

Court Orders: (1) (2)

Income Tax Returns/Documents:

Title/Mortgage Documents: (1) (2)

Leases: (1) (2)

Business Agreements, etc: (1) (2)

Safety Deposit Key:

Life Insurance Policies: (1) (2)

Home/Auto Insurance Policies: (1) (2)

Stocks/Bond Certificates: (1) (2)

Automobile Ownership:

Loan:

Appraisals: (1) (2)

Other Agreements: (1) (2)

Debts: (1) (2)