



PERSONAL INFORMATION

Name: _____

Date of Birth: _____ Birth Place: _____

Father's Surname: _____ Birth Place: _____

Mother's Maiden Name: _____ Birth Place: _____

Social Insurance No. _____ Employee No. _____

PEOPLE TO NOTIFY

Name: _____ Relationship: _____

Address: _____

_____ Phone No. _____

Name: _____ Relationship: _____

Address: _____

_____ Phone No. _____

Name: _____ Relationship: _____

Address: _____

_____ Phone No. _____

Name: _____ Relationship: _____

Address: _____

_____ Phone No. _____

Name: _____ Relationship: _____

Address: _____

_____ Phone No. _____

This list should include executors, relatives, friends, societies, clubs, professional associations and unions.



MEMORANDUM

FUNERAL and BURIAL INSTRUCTIONS

Though I realize the following is not binding on my Executor (Estate Trustee), the following are my wishes:

Choice of funeral home or memorial society:

Location of burial plot:

Open or closed coffin:

Cremation or not:

Where ashes are to be buried:

Location of funeral:

Wording of obituary:

Hymns or songs to be sung:

Pall bearers:

Charitable donations to be sent:

ASSETS

Location of Will _____

Location of Safety Deposit Boxes _____

Bank Accounts

<u>Bank</u>	<u>Branch</u>	<u>Account Number</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Stocks and Bonds

<u>Name</u>	<u>Amount</u>	<u>Location</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Insurance Policies and Death Benefits

<u>Company</u>	<u>Policy Number</u>	<u>Amount</u>	<u>Beneficiary</u>	<u>Location</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Pensions, RRSP'S, OHOSP'S

<u>Company</u>	<u>Amount</u>
_____	_____
_____	_____

Interest in Other Estates and Other Assets

Real Estate

<u>Address</u>	<u>Owners</u>	<u>Mortgages</u>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

Debts

Goods with a Chattel Mortgage or a Conditional Sale Purchase

<u>Company</u>	<u>Goods</u>	<u>Final Payment Date</u>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

Personal Loans

<u>Creditor (Bank)</u>	<u>Security Given</u>	<u>Amount Due</u>	<u>Final Payment Date</u>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>



MEMORANDUM

PERSONAL BELONGINGS

Though I realize the following is not binding upon my Executor (Estate Trustee), I would like the Executor, after consulting with the beneficiaries, to distribute the following personal belongings to the following persons:





PERSONAL ADVISORS

Lawyer: Lawrence S. Pascoe

Address: 39 Robertson Road, Suite 300, Ottawa, Ontario, K2H 8R2

Phone No. (613) 828-2120, ext 117 **Reason to Notify:** to administer estate

Life Insurance Agent: _____

Address: _____

Phone No. _____ **Reason to Notify:** _____

Stock Broker: _____

Address: _____

Phone No. _____ **Reason to Notify:** _____

Accountant: _____

Address: _____

Phone No. _____ **Reason to Notify:** _____

Investment Councillor: _____

Address: _____

Phone No. _____ **Reason to Notify:** _____

Spiritual Advisor: _____

Address: _____

Phone No. _____ **Reason to Notify:** _____

Doctor: _____

Address: _____

Phone No. _____ **Reason to Notify:** _____

Employer Personnel Department: _____

Address: _____

Phone No. _____ **Reason to Notify:** _____



LOCATION OF DOCUMENTS

(A - accountant's office) (B - stock broker's office) (H - home) (L - lawyer's office) (O - office)
(S - safety deposit box) (W - Will manual)

Use one of the locations above to identify where the following documents may be found:

- Will: _____
- Income tax returns: _____
- Marriage Certificate: _____
- Birth Certificate: _____
- Bank books: _____
- Stocks: _____
- Bonds: _____
- Deeds to property: _____
- Life insurance policies: _____
- Mortgage, loan, creditor documents: _____
- Funeral arrangements: _____
- Automobile insurance policies: _____
- Property insurance policies: _____