

# Your personal records organizer



This record organizer is designed to help you organize, in one handy location, important information about your personal and financial affairs. You'll find it will be easy to update once each year. As well, it will help your survivors wind up your personal affairs after your death.

Keep this record organizer in a safe place along with your other important papers. Let your family know where it's kept. If you include information in here about a living will and organ donation, your family should also be aware that you've made these arrangements. Specific information about this is usually kept with you in your wallet.

Please note: In Quebec, executors are known as liquidators. Therefore references to executors in this brochure include liquidators in Quebec. Also, in Quebec, some estate planning duties may be performed by either lawyers or notaries, with certain duties being more typically performed by notaries.

# Your personal records

## Next of kin

**Name** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Name** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Name** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Name** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Name** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

## Others to be notified

**Executor** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Advisor** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Employer/business partner(s)** \_\_\_\_\_

\_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Lawyer** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Accountant** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Doctor** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_



**Dentist** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Bank/credit union** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Stock broker** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

**Trust officer** \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

E-mail \_\_\_\_\_

## Your will

Do you have a will?  Yes  No

The original is located \_\_\_\_\_

A copy is located \_\_\_\_\_

The will was dated/last updated \_\_\_\_\_

## Living will

Do you have a living will?  
(if allowed in your province)?  Yes  No

Where is your living will kept? \_\_\_\_\_

## Power of attorney

Have you named a power of attorney?  Yes  No

Who \_\_\_\_\_

Arrangements are made through \_\_\_\_\_  
\_\_\_\_\_

The original is located \_\_\_\_\_

A copy is located \_\_\_\_\_

## Organ donation

Do you want to donate your organs  
or body for transplant,  
medical research or education?  Yes  No  
If yes, have you explained this in your:

will?

organ donor card?

driver's license?

## Funeral arrangements

Have you made funeral arrangements?  Yes  No

Funeral home and address \_\_\_\_\_

Telephone \_\_\_\_\_

Have you set out instructions  
for burial/cremation or funeral?  Yes  No

Are these instructions in your will?  Yes  No

In a letter?  Yes  No

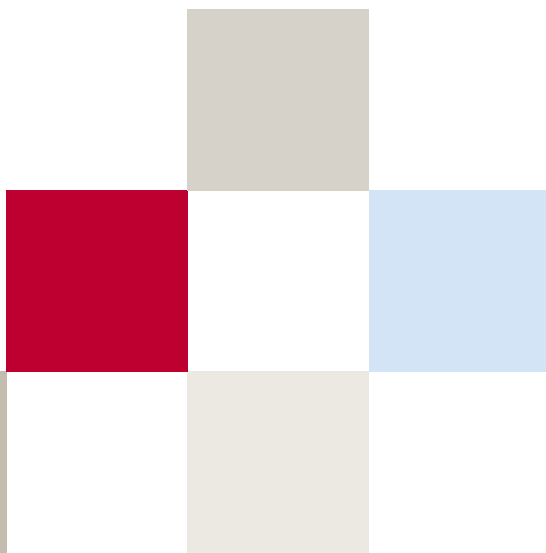
They are located \_\_\_\_\_

Do you own a cemetery plot?  Yes  No

Have you provided for its ongoing care?  Yes  No

The plot is located \_\_\_\_\_

The deed to it is kept \_\_\_\_\_



## Personal information

Date of birth \_\_\_\_\_

Place of birth \_\_\_\_\_

Birth certificate is located \_\_\_\_\_

Social insurance/social security number  
\_\_\_\_\_

Citizenship papers  Yes  No

They are located \_\_\_\_\_

Marriage certificate  Yes  No

Located \_\_\_\_\_

Military service  Yes  No

Discharge papers are located \_\_\_\_\_

Country served \_\_\_\_\_

Veteran's number \_\_\_\_\_

## Previous employers

Start with the first and put the current or most recent employer last.

Employer \_\_\_\_\_

Year \_\_\_\_\_

Address/e-mail \_\_\_\_\_  
\_\_\_\_\_

Employer \_\_\_\_\_

Year \_\_\_\_\_

Address/e-mail \_\_\_\_\_  
\_\_\_\_\_

Employer \_\_\_\_\_

Year \_\_\_\_\_

Address/e-mail \_\_\_\_\_  
\_\_\_\_\_

Employer \_\_\_\_\_

Year \_\_\_\_\_

Address/e-mail \_\_\_\_\_  
\_\_\_\_\_

Employer \_\_\_\_\_

Year \_\_\_\_\_

Address/e-mail \_\_\_\_\_  
\_\_\_\_\_

## Bank accounts

Be sure to list all your bank accounts, so your executor or family can find the money you have in these accounts.

**Bank/credit union** \_\_\_\_\_

Branch \_\_\_\_\_

Account # \_\_\_\_\_

Type \_\_\_\_\_

**Bank/credit union** \_\_\_\_\_

Branch \_\_\_\_\_

Account # \_\_\_\_\_

Type \_\_\_\_\_

**Bank/credit union** \_\_\_\_\_

Branch \_\_\_\_\_

Account # \_\_\_\_\_

Type \_\_\_\_\_

**Bank/credit union** \_\_\_\_\_

Branch \_\_\_\_\_

Account # \_\_\_\_\_

Type \_\_\_\_\_

## Financial commitments

### Rent or mortgage payments

Amount \$ \_\_\_\_\_

Due date \_\_\_\_\_

Lender \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

### Outstanding loans

Amount \$ \_\_\_\_\_

Due date \_\_\_\_\_

Lender \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Amount \$ \_\_\_\_\_

Due date \_\_\_\_\_

Lender \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

**Bills paid through automatic payment plan**

Amount \$ \_\_\_\_\_ Due date \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Amount \$ \_\_\_\_\_ Due date \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Amount \$ \_\_\_\_\_ Due date \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Amount \$ \_\_\_\_\_ Due date \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

**Other financial obligations or commitments**

For \_\_\_\_\_

Located \_\_\_\_\_

For \_\_\_\_\_

Located \_\_\_\_\_

**Life insurance**

**Policies you own on your life**

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

**Policies you own on others**

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

**Policies others own on your life**

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

**Group or association life insurance**

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

**Critical illness insurance**

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

**Disability insurance**

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_



## Hospital and medical insurance

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

Company \_\_\_\_\_

Policy number \_\_\_\_\_

Policy is located \_\_\_\_\_

## Pension plans

Are you a member of a registered pension plan?

Yes  No

Carrier name and address \_\_\_\_\_

\_\_\_\_\_

Carrier name and address \_\_\_\_\_

\_\_\_\_\_

Information about these plans is located \_\_\_\_\_

\_\_\_\_\_

Do you have a registered retirement savings plan (RRSP)?

Yes  No

Carrier name and address \_\_\_\_\_

\_\_\_\_\_

Carrier name and address \_\_\_\_\_

\_\_\_\_\_

Information about these plans is located \_\_\_\_\_

\_\_\_\_\_

Are you a member of a deferred profit sharing plan?

Yes  No

Carrier name and address \_\_\_\_\_

\_\_\_\_\_

Carrier name and address \_\_\_\_\_

\_\_\_\_\_

Information about these plans is located \_\_\_\_\_

\_\_\_\_\_

## Investments

### Segregated funds/mutual funds/RESPs

Yes  No

**Fund** \_\_\_\_\_

Policy number \_\_\_\_\_

Carrier name and address \_\_\_\_\_

\_\_\_\_\_

Do you invest regularly using automatic withdrawals?

Yes  No

How often? \_\_\_\_\_

Where is it taken from? \_\_\_\_\_

Do you receive income?  Yes  No

How often? \_\_\_\_\_

Where is it deposited? \_\_\_\_\_

Information about these investments is located \_\_\_\_\_

\_\_\_\_\_

**Fund** \_\_\_\_\_

Policy number \_\_\_\_\_

Carrier name and address \_\_\_\_\_

\_\_\_\_\_

Do you invest regularly using automatic withdrawals?

Yes  No

How often? \_\_\_\_\_

Where is it taken from? \_\_\_\_\_

Do you receive income?  Yes  No

How often? \_\_\_\_\_

Where is it deposited? \_\_\_\_\_

Information about these investments is located \_\_\_\_\_

\_\_\_\_\_

**Fund** \_\_\_\_\_

Policy number \_\_\_\_\_

Carrier name and address \_\_\_\_\_  
\_\_\_\_\_

Do you invest regularly using automatic withdrawals?

Yes  No

How often? \_\_\_\_\_

Where is it taken from? \_\_\_\_\_

Do you receive income?  Yes  No

How often? \_\_\_\_\_

Where is it deposited? \_\_\_\_\_

Information about these investments is located \_\_\_\_\_  
\_\_\_\_\_

**Fund** \_\_\_\_\_

Policy number \_\_\_\_\_

Carrier name and address \_\_\_\_\_  
\_\_\_\_\_

Do you invest regularly using automatic withdrawals?

Yes  No

How often? \_\_\_\_\_

Where is it taken from? \_\_\_\_\_

Do you receive income?  Yes  No

How often? \_\_\_\_\_

Where is it deposited? \_\_\_\_\_

Information about these investments is located \_\_\_\_\_  
\_\_\_\_\_

**RRIF and/or annuity contracts**  Yes  No

Policy number \_\_\_\_\_

Carrier name and address \_\_\_\_\_

Do you receive income?  Yes  No

How often? \_\_\_\_\_

Where is it deposited? \_\_\_\_\_

Information about these annuities is located \_\_\_\_\_  
\_\_\_\_\_

Policy number \_\_\_\_\_

Carrier name and address \_\_\_\_\_  
\_\_\_\_\_

Do you receive income?  Yes  No

How often? \_\_\_\_\_

Where is it deposited? \_\_\_\_\_

Information about these annuities is located \_\_\_\_\_  
\_\_\_\_\_

**Bonds and government investments**

Do you have any government bonds?  Yes  No

Type of bond \_\_\_\_\_

Bearer \_\_\_\_\_

Registered in my name  Yes  No

Co-registered with \_\_\_\_\_

Serial numbers \_\_\_\_\_  
\_\_\_\_\_

The bonds are located \_\_\_\_\_

**Securities**

Do you own any stocks or bonds?  Yes  No

Information about them is located \_\_\_\_\_  
\_\_\_\_\_

Did you acquire any of them by gift or inheritance?

Yes  No

Are any of your securities pledged for loans?

Yes  No

With whom \_\_\_\_\_  
\_\_\_\_\_



## Residence and real estate

### Type of real estate (e.g. house, condo, etc.)

\_\_\_\_\_

Title is held by  You  Spouse  Joint

Is there a mortgage?  Yes  No

Mortgage is held by \_\_\_\_\_

### Type of real estate (e.g. house, condo, etc.)

\_\_\_\_\_

Title is held by  You  Spouse  Joint

Is there a mortgage?  Yes  No

Mortgage is held by \_\_\_\_\_

### Type of real estate (e.g. house, condo, etc.)

\_\_\_\_\_

Title is held by  You  Spouse  Joint

Is there a mortgage?  Yes  No

Mortgage is held by \_\_\_\_\_

### Where are the following located?

Deeds \_\_\_\_\_

Copy of mortgages \_\_\_\_\_

Property insurance policies \_\_\_\_\_

Land surveys \_\_\_\_\_

Property tax receipts \_\_\_\_\_

Leases \_\_\_\_\_

Building cost figures \_\_\_\_\_

## Personal property

List all vehicles you own \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Vehicle registrations are located \_\_\_\_\_

\_\_\_\_\_

Bill of sale and insurance papers are located \_\_\_\_\_

\_\_\_\_\_

Jewelry, stamp collections, coin collections, etc. are located

\_\_\_\_\_

Are household furnishings insured?  Yes  No

Bill of sale, an inventory of and insurance policies for household furnishings are located:

\_\_\_\_\_

## Debtors and creditors

### People who owe you money

Name \_\_\_\_\_

Amount \_\_\_\_\_

Date \_\_\_\_\_

Address/e-mail \_\_\_\_\_

\_\_\_\_\_

Name \_\_\_\_\_

Amount \_\_\_\_\_

Date \_\_\_\_\_

Address/e-mail \_\_\_\_\_

\_\_\_\_\_

### People to whom you owe money (other than previously listed)

Name \_\_\_\_\_

Amount \_\_\_\_\_

Date \_\_\_\_\_

Address/e-mail \_\_\_\_\_

\_\_\_\_\_

Name \_\_\_\_\_

Amount \_\_\_\_\_

Date \_\_\_\_\_

Address/e-mail \_\_\_\_\_

\_\_\_\_\_

Loan agreements or promissory notes are located

\_\_\_\_\_

## Safe deposit box

Do you have a safe deposit box?  Yes  No

Location \_\_\_\_\_

Names of others who have access to it \_\_\_\_\_

Location of the keys \_\_\_\_\_

List of contents is kept \_\_\_\_\_

## Charitable gifts

For \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

For \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

## Contractual obligations

For \_\_\_\_\_

Located \_\_\_\_\_

For \_\_\_\_\_

Located \_\_\_\_\_

For \_\_\_\_\_

Located \_\_\_\_\_

For \_\_\_\_\_

Located \_\_\_\_\_

## Trust funds

Have you created any trusts?  Yes  No

Purpose \_\_\_\_\_

Trust agreement was drawn up by \_\_\_\_\_

\_\_\_\_\_

Trust papers are located \_\_\_\_\_

## Income tax

Your tax advisor is \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

E-mail \_\_\_\_\_

Your tax data and supporting data are located \_\_\_\_\_

\_\_\_\_\_

## Memberships

List all memberships in clubs, associations and subscriptions.

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Name \_\_\_\_\_

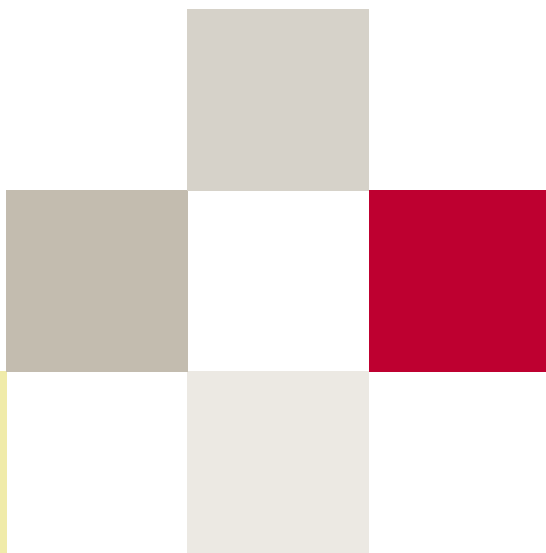
Address \_\_\_\_\_

\_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_







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