

Estate Check List (Don't forget to consult a lawyer.)

Basic Personal Information			
Full Name			Date of Birth
Current Address :	Street		
	City	Province	Postal Code
SIN #		Passport #	
Next of Kin			
Contact info for next of Kin			
Current Employer			
Employer Contact Info (phone or email)			

Last Will and Testament Information	
Name of Lawyer who prepared will	
Contact info for Lawyer	
Name of Executor(s)	
Contact info for Executor(s)	

Burial and Memorial Wishes	
Name of Funeral Home if arrangements pre-made	
Contact info for funeral home	
Memorial donations to where?	
Cremation or Coffin burial?	
Church or other memorial desired?	
Specific readings at memorial?	
Specific individuals to be asked to read?	
Specific music at memorial?	

Bank Account Information		
Name of Bank	Account #	Type of Account

Bank Access Information			
Name of Bank	Bank PIN #	Card Access Number	Web Access Password

Estate Check List... Continued

Credit Card Information				
Company	Account #	3 digit security #	Expiry Date	Web Access Password
AMEX				
Mastercard				
VISA				

Regular Bill Payments				
Type	Name	Account #	Payment Method	Average Amount
Cable				
Condo Fees				
Credit Card	AMEX			
Credit Card	Mastercard			
Credit Card	VISA			
Insurance - Car				
Insurance - Home				
Insurance - Other				
Phone				
Power				
Rent				
Tax - Property				
Other -				
Other -				

DOCUMENTS (original where possible or copies)	Current Location
Assets List (include receipts for major assets and identification of beneficiaries for specific items – very important for items not identified in your will)	
Bank Records and Statements	
Certificate of Birth	
Certificate of Marriage	
Deeds for property, homes	
Income Tax Records	
Insurance Policies	
Obituary write-up and memorial/burial wishes	
Passport	
Receipts for major assets	
Safety Deposit Box	
SIN card	
Vehicle registration for car(s)	
Will (original) & any instructions to your executor	
Final correspondence to any loved ones	
Other -	

Date the above Information was last reviewed : _____
 (Regular annual review is recommended. Please be sure to keep completed Check List in a safe, secure location.)