

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

Basic Personal Information				
Full Name	Michael Smith		Date of Birth	Jan 5, 1948
Current Address :	Street	1234 Jackson Road		
	City	Halifax	Province	Nova Scotia
			Postal Code	B3H 2H6
SIN #	115-642-325		Passport #	WO68315JK
Next of Kin	Anne Smith (wife); if predeceases me, then Jonathan Smith (son)			
Contact info for next of Kin	Anne Smith 902-443-6964; Jonathan Smith 902-489-2233			
Current Employer	Handy Equipment Company			
Employer Contact Info (phone or email)	902-432-5858			

Last Will and Testament Information	
Name of Lawyer who prepared will	James Jones of Lucky Lawyers Inc
Contact info for Lawyer	1111 Spring Road, Halifax, NS 902-422-4321
Name of Executor(s)	Anne Smith (wife); if predeceases me, then Jonathan Smith (son)
Contact info for Executor(s)	Anne Smith 902-443-6964; Jonathan Smith 902-489-2233

Burial and Memorial Wishes	
Name of Funeral Home if arrangements pre-made	Last Stop Funeral Home
Contact info for funeral home	9876 Snow Avenue, Halifax, NS 902-489-6262
Memorial donations to where?	DMRF and/or SPCA
Cremation or Coffin burial?	Cremation
Church or other memorial desired?	Memorial wishes attached
Specific readings at memorial?	Memorial wishes attached
Specific individuals to be asked to read?	Memorial wishes attached
Specific music at memorial?	Memorial wishes attached

Bank Account Information		
Name of Bank	Account #	Type of Account
TD Canada Trust	Branch#123 Acct# 46484932	Chequing Account
TD Canada Trust	Branch#123 Acct# 99887766	Tax Free Savings Account (TFSA)
TD Canada Trust	Branch#123 Acct# 0675986	Registered Retirement Fund (RRIF)
Bank of Nova Scotia	Branch#8866 Acct#7654932	Savings Account

Bank Access Information			
Name of Bank	Bank PIN #	Card Access Number	Web Access Password
TD Canada Trust	7654	4312896589951634	lollipop
Bank of Nova Scotia	31526	16735735694	yEaR2012

Estate Check List... Continued

Credit Card Information				
Company	Account #	3 digit security #	Expiry Date	Web Access Password
AMEX	do not have one			
Mastercard	5491-9800-1399-6271	178	03/2014	hello2012BYE
VISA	4500-1111-2222-3333	649	05/2015	BYE2012hello

Regular Bill Payments				
Type	Name	Account #	Payment Method	Average Amount
Cable	Eastlink	8124555566661111	Online paymt TD acct	\$100 per month
Condo Fees	H.C.C.C. #109	not applicable	Post-dated cheques	\$400 per month
Credit Card	AMEX	not applicable		
Credit Card	Mastercard	see above	Online payment TD acct	varies
Credit Card	VISA	see above	Online payment TD acct	varies
Insurance - Car	ABC Insurance	23546-001	Auto withdrawal TD acct	\$100 per month
Insurance - Home	ABC Insurance	23546-099	Auto withdrawal TD acct	\$25 per month
Insurance - Other	Daye Insurance	00659873656	Auto withdrawal TD acct	see insurance agreemt
Phone	Bell Aliant	2788655	Online paymt TD acct	\$75 per month
Power	NSP	146723	Online paymt TD acct	\$300 bi-monthly
Rent	not applicable			
Tax - Property	HRM	07024817	Online paymt TD acct	\$2000 biannually
Other -	Parking	Purdy's Wharf Parking	on VISA card	\$200 per month
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	In home filing cabinet
Certificate of Birth	In home locked box
Certificate of Marriage	In home locked box
Deeds for property, homes	Safety Deposit Box #456 at TD bank
Income Tax Records	In home filing cabinet
Insurance Policies	Safety Deposit Box #4561 at TD bank
Obituary write-up and memorial/burial wishes	In home locked box
Passport	In home locked box
Receipts for major assets	In home filing cabinet
Safety Deposit Box	#456TD Brnch7654 (key in home locked bx)
SIN card	In home locked box
Vehicle registration for car(s)	In home locked box
Will (original) & any instructions to your executor	Safety Deposit Box #4561 at TD bank
Final correspondence to any loved ones	Sealed in home locked box
Other -	

Date the above Information was last reviewed : April 1, 2012
 (Regular annual review is recommended. Please be sure to keep completed Check List in a safe, secure location.)