

My Life List

My Life List is designed to help you collect and review all of the key personal and financial information in your life. This information can be extremely helpful to your executor and loved ones if you were to pass away. It can also assist you and your financial advisor to build a more complete financial plan.



beneva

About me

Name

Address

Telephone

Email

Social Insurance Number

Emergency contact name

Emergency contact telephone

My professionals

Lawyer

Name

Address

Telephone

Email

Accountant

Name

Address

Telephone

Email

Financial advisor

Name

Address

Telephone

Email

Insurance agent

Name

Address

Telephone

Email

Doctor/healthcare

Name

Address

Telephone

Email

My legal documents

I have a will Yes No If yes, it is located: _____

Person who prepared my Will

Name

Address

Telephone

Email

My executor

Name

Address

Telephone

Email

I have a Power of Attorney for Property Yes No

If yes, it is located: _____

Person who prepared my Power of Attorney for Property

Name

Address

Telephone

Email

My Power of Attorney for Property

Name

Address

Telephone

Email

I have a Power of Attorney for Personal Care Yes No

If yes, it is located: _____

Person who prepared my Power of Attorney for Personal Care

Name

Address

Telephone

Email

My Power of Attorney for Personal Care

Name

Address

Telephone

Email

I have a legal trust Yes No

If yes, it is located: _____

Person who prepared my trust

Name

Address

Telephone

Email

My funeral arrangements

I have paid in advance for funeral arrangements Yes No

If yes, name and address of funeral home: _____

My employment information

My current employer _____

Address _____

Telephone _____

Email _____

I have group insurance Yes No

I am part of a pension plan Yes No

I am entitled to pension or other benefits from a past employer Yes No

If yes, details: _____

My personal documents

I have a birth certificate Yes No If yes, it is located: _____

I have a marriage certificate Yes No If yes, it is located: _____

I have a divorce or separation agreement Yes No If yes, it is located: _____

List details of any other important personal documents: _____

My home

I rent my home Yes No

If yes, name and number of landlord: _____

Record details of:

Electricity

Phone

Gas

Cable

Water

Internet

This is located: _____

My credit cards

Record the following details:

- Card number
- Expiration date
- Copy of recent account statements
- Login and password for online account access

This is located: _____

Tip Store physical documents in a fireproof safe, a safety deposit box, or with your lawyer. Make sure at least two loved ones know how to access these places if they need to.

My mortgage or loans

Record the following details:

- Company that provided the loan or mortgage
- Copy of the mortgage or loan agreement

This is located: _____

My tax return

Record the following details:

- Copy of recent tax return
- Login and password for online CRA account access if applicable

This is located: _____

My titles and deeds

Record titles or deeds to any property, such as:

- Real estate
- Motor vehicles
- Boats

This is located: _____

My bank accounts

Record account statements and online login information for:

- Chequing accounts
- Savings accounts
- US dollar accounts

This is located: _____

Tip Make digital copies of your paper documents using a scanner, a scanning app or a camera. This will help protect you from loss and make retrieving your documents easy.

My investments

Record account statements and online login information for:

- Mutual funds
- GICs
- Stocks
- Bonds
- Savings bonds
- RRSPs
- TFSAs
- Non-registered investments
- Shares in a private company

This is located: _____

My insurance

Record account statements and policy documents for:

- Life insurance
- Disability insurance
- Critical illness insurance
- Home and auto insurance
- Health insurance
- Pet insurance

My physical assets

Record location and value of personal items such as:

- Paintings and sculptures
- Jewellery and watches
- Antiques and collectibles

Tip Walk through your home and storage places with a notebook or video camera to make note of all your belongings. This can help with estate planning and in the event of fire or theft.

My physical storage

Location of fireproof safe and how to access: _____

Location of safe deposit box and how to access: _____

Location of storage facility and how to access: _____

My email accounts

Record login credentials for all accounts

- Gmail
- Hotmail
- Yahoo! Mail
- AOL
- Other

This is located: _____

My payments or e-commerce accounts

Record login credentials for all accounts

- PayPal
- Venmo
- Amazon
- Ebay

This is located: _____

My social media accounts

Record login credentials for all accounts

- Facebook
- Instagram
- Twitter
- LinkedIn

This is located: _____

My notes

Use this space to write down anything else that might be important for somebody to know if they were responsible for managing your affairs.
