



GREEN PRIVATE WEALTH

# Estate Directory



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 HARBOURFRONT  
WEALTH MANAGEMENT

# Good Record Keeping

## IS THE KEY TO EFFECTIVE ESTATE PLANNING

Your Estate Directory serves as a one-stop place to keep essential information and documents for ongoing reference, as well as emergencies.

In times of stress, there is nothing worse than struggling to find important information for yourself or a loved one. This organizer helps you centralize data about your personal and financial life – including your medical specialists, advisors, insurance policies, and where you keep your financial assets and legal documents such as your will and powers of attorney.

Taking the time to document this information in one spot creates other benefits. First, it helps assist your executors and powers of attorney with their difficult task you have assigned to them. Second it helps that we have the correct and up-to-date information needed to provide you with comprehensive and sound advice to meet your personal goals.

Once the task is completed, your Financial Organizer provides an immediate and lasting benefit – a sense of control over your financial affairs. We encourage you to put it to good use and to help other family members to do the same.

# 1. Personal Data

Your name	
Your spouse's name	
Address	
Home phone number	
Cell number(s)	
Email address(es)	

Identification Numbers	YOU	YOUR SPOUSE
Birth date		
Social insurance number		
Passport number & expiry		
Driver's license number		
Citizenship		

Current Employer	YOU	YOUR SPOUSE
Company name		
Address		
Contact name		
Phone number		

## 2. Medical Information

Identification Numbers	YOU	YOUR SPOUSE
Health Card Number		
Group Insurance Plan		
Carrier		
Plan Number		
Family Doctor		
Phone		
Dentist		
Phone		
Specialist		
Phone		
Specialist		
Phone		
Specialist		
Phone		
Blood Type		
Allergies		
Medications		
Other Notes		

# 3. Key People to Contact

Please provide pertinent information for your children, grandchildren and other heirs to whom property may be devised. On the following pages you can list other important family and friends that you would like contacted in case of emergency.

Name	
Address	
Date of Birth	
Phone Number	
Gender	M <input type="checkbox"/> F <input type="checkbox"/>
Relationship	
Married	
Children	

Name	
Address	
Date of Birth	
Phone Number	
Gender	M <input type="checkbox"/> F <input type="checkbox"/>
Relationship	
Married	
Children	

Name	
Address	
Date of Birth	
Phone Number	
Gender	M <input type="checkbox"/> F <input type="checkbox"/>
Relationship	
Married	
Children	

Name	
Address	
Date of Birth	
Phone Number	
Gender	M <input type="checkbox"/> F <input type="checkbox"/>
Relationship	
Married	
Children	

Name	
Address	
Date of Birth	
Phone Number	
Gender	M <input type="checkbox"/> F <input type="checkbox"/>
Relationship	
Married	
Children	

Name	
Address	
Date of Birth	
Phone Number	
Gender	M <input type="checkbox"/> F <input type="checkbox"/>
Relationship	
Married	
Children	

# 4. Additional Contacts

On the following pages you can list other family, friends and acquaintances that are important to you. Many of these people might be overlooked in the event of an emergency. The people that are on your personal phone list, church and club directories, your Christmas card list, and business cards are some that could be included here.

Name	
Address	
Phone number	
Relationship	

Name	
Address	
Phone number	
Relationship	

Name	
Address	
Phone number	
Relationship	

Name	
Address	
Phone number	
Relationship	

Name	
Address	
Phone number	
Relationship	

Name	
Address	
Phone number	
Relationship	

Name	
Address	
Phone number	
Relationship	

Name	
Address	
Phone number	
Relationship	

Name	
Address	
Phone number	
Relationship	

Name	
Address	
Phone number	
Relationship	

# 5. Professional Advisors

## Financial Advisor

Name	
Address	
City	
Province	
Postal Code	
Phone Number	

## Financial Advisor

Name	
Address	
City	
Province	
Postal Code	
Phone Number	

## Accountant/Tax Preparer

Name	
Address	
City	
Province	
Postal Code	
Phone Number	

## Lawyer/Legal Advisor

Name	
Address	
City	
Province	
Postal Code	
Phone Number	

## Executor

Name	
Address	
City	
Province	
Postal Code	
Phone Number	

## Executor

Name	
Address	
City	
Province	
Postal Code	
Phone Number	

## Powers of Attorney

Name	
Address	
City	
Province	
Postal Code	
Phone Number	

## Children's Guardian

Name	
Address	
City	
Province	
Postal Code	
Phone Number	

# 6. Location of Documents

Most of your important documents may be kept in this binder but other documents might be somewhere else in your home, office, safety deposit box, or another place. This section can be used to let your key contacts know where all of your documents are located. In the space provided please identify where the following documents are kept.

DOCUMENT	LOCATION
Will / Dual Will	
Living Will / Powers of Attorney	
Income Tax returns	
Marriage documents	
Prenuptial agreement	
Birth certificates, citizenship papers, passport	
Business agreements	
Investment Certificates	
Deeds for all real estate	
Outstanding loan documents	
Funeral arrangements	
Insurance / benefits documents	
Personal valuables	

## MY SAFETY DEPOSIT BOX IS LOCATED:

Bank Name	
Location of the key	
Address	





# 8. Retirement Accounts

## Retirement Accounts

Financial Institution	Type (RRSP, TFSA, pension, LIRA, LIF, RRIF)	Account #	Value	Ownership (H/W/J)

## Insurance

Insurance Company	Owner	Insured	Beneficiary	Ownership (H/W/J)	Cash Value

## Real Estate

	Value	Ownership (H/W/J)
Primary Residence		
Other		
Other		
Other		
Other		



# 10. Miscellaneous

Items	Description	Value	Ownership (H/W/J)
Art			
Jewelery			
Antiques			
Auto			
Books			
Valuables			
Other			



At Green Private Wealth, we're committed to protecting and evolving our clients' wealth through cutting-edge thinking, sound financial planning, and a disciplined approach.

THIS SETS US APART - AND IT'S MADE ALL THE DIFFERENCE IN HELPING OUR CLIENTS ACHIEVE THEIR GOALS AND DREAMS.



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