

# Estate Directory



### 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			١
Address			A
Date of Birth			
Phone Number			F
Gender	М	F 🗌	(
Relationship			F
Married			١
Children			(
Name			١
Address			A
Date of Birth			
Phone Number			F
Gender	М	F 🗌	(
Relationship			F
Married			١
Children			(
Name			١
Address			A
Date of Birth			[
Phone Number			F
Gender	M 🗌	F 🗌	(
Relationship			F
Married			١
Children			(

Name		
Address		
Date of Birth		
Phone Number		
Gender	М	F
Relationship		
Married		
Children		
Name		
Address		
Date of Birth		
Phone Number		
Gender	M	F
Relationship		
Married		
Children		
Name		
Address		
Date of Birth		
Phone Number		
Gender	М	F 🗌
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	Name
Address	Address
Phone number	Phone number
Relationship	Relationship
Name	Name
Address	Address
Phone number	Phone number
Relationship	Relationship
Name	Name
Address	Address
Phone number	Phone number
Relationship	Relationship
Name	Name
Address	Address
Phone number	Phone number
Relationship	Relationship
Name	Name
Address	Address
Phone number	Phone number
Relationship	Relationship

### 5. Professional Advisors

Financial Advisor

#### Financial Advisor Name Name Address Address City City Province Province Postal Code Postal Code Phone Number Phone Number Accountant/Tax Preparer Lawyer/Legal Advisor Name Name Address Address City City Province Province Postal Code Postal Code Phone Number Phone Number Executor Executor Name Name Address Address City City Province Province Postal Code Postal Code Phone Number Phone Number Children's Guardian Powers of Attorney Name Name Address Address City City Province Province Postal Code Postal Code Phone Number 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		

### 7. Assets & Liabilities

In this section, please list your assets and liabilities. Please list the value or estimated fair market value of your assets under the value column. Under the ownership column please mark with H for husband, W for wife and J for joint ownership. If there is debt associated with an assets, list the debt separately under "Personal Liabilities" below. There are three purposes for this section. First, this gives your executor(s) a starting point for locating and collecting assets if they are not familiar with your finances. Second, there is less chance of assets being overlooked or lost in the beginning stages of administration. Third, and most importantly, there are certain tax advantages that can be used in order to minimize taxes on death, however, their availability depends upon the value and ownership of the assets.

#### Bank Accounts (please provide statements to all accounts)

Financial Institution	Type (Chequing, savings, GIC)	Account #	Value	Ownership (H/W/J)

#### Investment Accounts (please provide statements to all accounts)

Financial Institution	Type (Chequing, savings, GIC)	Account #	Value	Ownership (H/W/J)

### 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		

### 9. Business Interests

#### **Business Interests**

Business Name	Address	Туре	Value	Ownership (H/W/J)

#### Business Investment Accounts (please provide statements to all accounts)

Financial Institution	Type (stocks, bonds, mutual funds)	Account #	Value	Ownership (H/W/J)

#### **Business Insurance**

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

# 10. Miscellaneous

Items	Description	Value	Ownership (H/W/J)
Art			
Jewelery			
Antiques			
'			
Auto			
71010			
Pooks			
Books			
Valuables			
Other			
Otner			

# 11. Other

#### Other Investments or Assets Not Listed Elsewhere

Description	Value	Ownership (H/W/J)

#### Description of Personal Liabilities

Description	Value	Ownership (H/W/J)

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





112 Springbank Ave. N., Woodstock, ON N4S 7P8 📞 (519) 539.8212 greenprivatewealth.com

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