

Kapur

FINANCIAL GROUP

My Estate

Essential Information
for My Family

Estate of _____

Date _____

Compliments of Bindu Kapur
Certified Financial Planner
www.kapurfinancial.com
416-616-2775

Important Account Log-In Information

Account	Username	Password

Document Location

Account	Location	Notes

Insurance Information

Type of Insurance	Amount of Insurance	Policy Number	Policy Location

Investment Information

Type	How Much	Account Number	Where is Account Located
RRSP			
TFSA			
RIF			

Monthly Income

What	When Receive	Amount	Which Account

Pre-Authorized Payments

What	When Pay	How Much	Which Account

