

# Financial Information

## Critical information at your fingertips

As part of financial planning, this document directs you and your love ones to locate pertinent people and documents in your life. Organizing your finance is particularly important during emergencies and/or challenging times, this can significantly reduce stress and discord. It can be as comprehensive as you want it to be, it is your document.

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Your Name

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Date



Worksheet provided by:  
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## Key contacts

Personal	Name	Contact Information
Family member		
Family member		
Friend		
Friend		
Family Doctor		
Other physician		
Other physician		
Pediatrician		
Guardian or emergency contact for minor(s)		
Financial advisor		
Primary medical insurance		
Secondary medical insurance		
Dentist		
Employer		
Veterinarian		
Therapist/Counselor		
Coach/Mentor		
Accountant		
Attorney		
Executor		
Power of Attorney		
Telephone provider		
Cellular phone provider		
Cable/Internet provider		
Gas company		
Electric company		

## Personal Information

Personal	Provider contact information	Where do I keep these documents?
<i>Example: Adoption papers</i>	<i>John Smith 123 Birch Street, Vancouver, BC V8N1M3 778.321.3210</i>	<i>Black file cabinet, basement or den computer, My Documents &gt; Adoption</i>
Social Insurance Number card		
Birth certificates		
Passport/Citizenship (naturalization) papers		
Driver's license number and expiration date		
Marriage certificate		
Provincial Medical Services Plan		
Extended Health Plan Coverage from Employer		
Dental Plan from Employer		
Life Insurance Plan from Employer		
Additional Life Insurance Plan		
Short Term Disability Plan		
Long Term Disability Plan		
Critical Illness Plan		
Home Insurance Policy		
Adoption papers		
Prenuptial agreement		
Divorce or separation papers		
Military discharge papers		
Safe deposit box and key		
School Records		

Ownership	Provider contact information	Where do I keep these documents?
Real estate deeds		
Motor vehicle title(s)		
Other titles of ownership		
Appraisal and inventory of valuable items		
Tax	Provider contact information	Where do I keep these documents?
Prior years' federal and Provincial tax returns		
Property tax records		
CRA Notice of Assessment		

## Banking

Accounts	Provider contact information	Where do I keep these documents?
Savings Account statements		
Chequing Account statements		
Credit Card Statement		
Debit Card Statements		
TFSA Statements		
RRSP Statements		
Other Statements		

## Investment

	Provider contact information	Where do I keep these documents?
Brokerage account statements		
Mutual fund account statements		
Other managed account statements		
Stock certificates not held in an account		
Stock options		

## Credit and lending

	Provider contact information	Where do I keep these documents?
Mortgage		
Home equity line papers		
Car loan		
Student loans		
Other outstanding loans		
Promissory notes		
Rental and/or lease agreements		

## Estate planning

Estate	Provider contact information	Where do I keep these documents?
Last will and testament		
Living will/Health care proxy		
Durable power of attorney		
Burial instructions		
Cemetery plot deed		
Prepaid cremation papers		
Funeral home preference and information		
Letter of instruction to executor/executrix		
Beneficiary for accounts		
Insurance	Provider contact information	Where do I keep these documents?
Long-term care insurance policy		
Life insurance policies		
Group life policies		
Accidental Death and Disability Plan		
Mortgage insurance policies		
Travel insurance policy		
Automobile insurance policy		
Property and casualty policies		
Beneficiary forms for insurance policies		

Personal and charitable trusts	Provider contact information	Where do I keep these documents?
Personal trust account		
Trustee information		
Charitable trust account		
Charitable donation preferences		
Special needs trusts	Provider contact information	Where do I keep these documents?
Child trust account		
Child trustee/guardian		
Adult trust account		
Adult trustee/guardian		
Executor to oversee financial affairs		

## Small business

	Provider contact information	Where do I keep these documents?
Incorporation/Ownership papers		
Financing papers		
Bank account statements		
Payroll records		
Employee records		
Employee retirement plans		
Stock option plans		
Other employee benefit plans		
Credit card statements		
Buy/Sell or partnership agreements		