NEW

Your Personal

Estate Directory

ESTATE DIRECTORY

If the unforeseen tragedy of death strikes close to home, would your family be able to locate everything required in a moment's notice? We don't even want to consider these things but the reality is life is extremely fragile.

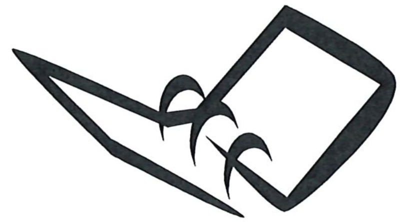
Your loved ones deserve to celebrate life instead of dwelling on pain and worrying about complications resulting from their loss.

We would like to introduce you to your personal **Estate Directory**, your **Estate Directory** is a means of alleviating pressure and ensuring your family is in the best possible position when the inevitable occurs.

The **Estate Directory** securely delivers any and all necessary information safely into the hands of your trusted executor, allowing you the peace of mind of knowing things will go exactly as planned. The **Estate Directory** ensures that every detail, from a safety deposit box code to all your current legal documents are available to your beneficiaries. Consider it the emergency phone which mountaineers carry when they face difficult challenges and harsh climate, each member of the expedition faces countless dangers and carry satellite phones to make sure they have a chance to communicate with their family no matter what happens.

This is not something you want to leave for another day, it will take less than an hour for the initial appointment, let us help you ensure that your plan is carried out as you intended, in an organized one case **Estate Directory.**

ESTATE DIRECTORY



THE ESTATE DIRECTORY

An Estate Directory is an accounting & directory of all of your assets & liabilities compiled together in an organized portfolio.

The below documents will be part of an Estate Directory:

- Wills & Power of Attorneys (Personal & Property)
- Business Interest Documents
- Land Interest Documents
- Buy/Sell Agreements
- Investments/ RRSP's, RRIF, LIF, LIRA, RESP's & Non Registered Investments
- Bank Account information
- Long Term Care Products
- Land Ownership documents
- Mortgages/Loans and Credit Card documents
- Life Insurance/Critical Illness & Disability Insurance Documents
- General Insurance Documents- Home/Auto/Liability
- Government Benefit Documents (CPP, OAS)
- Pension Documents
- Group Benefit Packages
- Name and contact information for- Financial Advisor/Insurance Agent, Lawyer, Accountant, Doctor and people to be notified in the event of an emergency or death.
- Intellectual Passwords (i.e. Facebook, Linkedin, Social media etc..)
- Pets? Where will they go?

Each Estate Directory prepared by us will of course be personalized for each individual and their situation.

The most important purpose for having an Estate Directory is having all important information for you and your family at your fingertips at the time when it's needed most, upon the death or incapacity of an individual.

The Estate Directory- Information Check List

Contact Pages:

Name: ______________________________

Emergency Contacts: (Doctor, Executor, Lawyer…etc.)

NAME & TITLE	PHONE & ADDRESS
____________________	____
____________________	____
____________________	____
____________________	____
____________________	____
____________________	____

Copy of All Important Legal Documents

Last Will and Testament	YES ☐	NO ☐
Living Power of Attorney – personal care	YES ☐	NO ☐
Living Power of Attorney – property	YES ☐	NO ☐
Land Ownership	YES ☐	NO ☐

Copy of Health Insurance Documents

Life	YES ☐	NO ☐
Critical Illness	YES ☐	NO ☐
Disability	YES ☐	NO ☐
Long-Term Care	YES ☐	NO ☐
Group Insurance Certificate	YES ☐	NO ☐

Copy of Property Insurance Documents

Home	YES ☐	NO ☐
Auto	YES ☐	NO ☐
Other (Business/Rental)	YES ☐	NO ☐

The Estate Directory- Information Check List- Page 2

Copy of Investments and banking information documents:

With Tax Consequences:

Pension Documents	YES ☐	NO ☐
Home Ownership	YES ☐	NO ☐
Registered Documents	YES ☐	NO ☐
Government Benefits (CPP, OAS, etc)	YES ☐	NO ☐

Without Tax Consequences:

Non-registered Investments	YES ☐	NO ☐
Bank Accounts	YES ☐	NO ☐
Mortgages, Loans and Lines of Credit	YES ☐	NO ☐
Credit Cards	YES ☐	NO ☐
Intellectual Passwords- (facebook, social media etc.)	YES ☐	NO ☐

Pre-Arranged Funeral?	YES ☐	NO ☐

If yes, provide:

Name of Funeral Home ______________________________

Phone Number: ______________________________

Address: ______________________________

Other Information

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