



Estate planning

# Personal records organizer



Organize important information  
about your personal and financial  
affairs in one handy location

Name \_\_\_\_\_

Date \_\_\_\_\_

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**Haunn Landers & Co.**  
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# How to use this organizer

Use this organizer as a handy master index of your personal and financial records.

- In each section, fill in names, addresses and other key details. Include more information, or less, based on what's important to you. Then write down the location of the documents that contain additional details.
- Keep this organizer in a secure place with your other important papers. Let your family know where it is.
- Give your estate plan a yearly checkup with your advisor. If you find anything's changed, update it in this organizer.

Organizing your information is an important step in your estate plan.

You can be confident your family and your executor will be able to find the information necessary to manage your affairs.

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# Basic personal information

## Your full legal name

---

Date and place of birth

---

Birth certificate is located

---

Social insurance number and location of card  
(also, if applicable, U.S. social security number)

---

Countries of which you are a citizen

---

Citizenship papers, if applicable, are located

---

Passport(s) are located

---

Driver's licence is located

---

Marriage certificate, if applicable, is located

---

Divorce papers, if applicable, are located

---

## Key contacts

### Immediate family

<b>Name</b>	Relationship
Address	Phone
	Email

<b>Name</b>	Relationship
Address	Phone
	Email

<b>Name</b>	Relationship
Address	Phone
	Email

<b>Name</b>	Relationship
Address	Phone
	Email

<b>Name</b>	Relationship
Address	Phone
	Email



## Other key contacts

You can include additional contacts at the end of this section.

### Executor

Your executor is the person you name to manage your estate after you die. In Quebec, executors are called liquidators.

Name \_\_\_\_\_ Address \_\_\_\_\_

Phone, email \_\_\_\_\_

### Advisor

Name \_\_\_\_\_ Address \_\_\_\_\_

Phone, email \_\_\_\_\_

### Employer or business partner

Name \_\_\_\_\_ Address \_\_\_\_\_

Phone, email \_\_\_\_\_

### Lawyer

Name \_\_\_\_\_ Address \_\_\_\_\_

Phone, email \_\_\_\_\_

### Lawyer 2

Name \_\_\_\_\_ Address \_\_\_\_\_

Phone, email \_\_\_\_\_

### Accountant

Name \_\_\_\_\_ Address \_\_\_\_\_

Phone, email \_\_\_\_\_

### Doctor

Name \_\_\_\_\_ Address \_\_\_\_\_

Phone, email \_\_\_\_\_

### Dentist

Name \_\_\_\_\_ Address \_\_\_\_\_

Phone, email \_\_\_\_\_

### Bank or credit union

Name \_\_\_\_\_ Address \_\_\_\_\_

Phone, email \_\_\_\_\_

### Stockbroker

Name \_\_\_\_\_ Address \_\_\_\_\_

Phone, email \_\_\_\_\_



**Trust officer**

Name \_\_\_\_\_ Address \_\_\_\_\_  
Phone, email \_\_\_\_\_

**Other contacts 1**

Relationship \_\_\_\_\_  
Name \_\_\_\_\_ Address \_\_\_\_\_  
Phone, email \_\_\_\_\_

**Other contacts 2**

Relationship \_\_\_\_\_  
Name \_\_\_\_\_ Address \_\_\_\_\_  
Phone, email \_\_\_\_\_

**Other contacts 3**

Relationship \_\_\_\_\_  
Name \_\_\_\_\_ Address \_\_\_\_\_  
Phone, email \_\_\_\_\_

## Your will and powers of attorney

Do you have a will?  Yes  No

Date of will (when last updated) \_\_\_\_\_

Original document is located \_\_\_\_\_

A copy is located \_\_\_\_\_

Type of will:  notarized  witnessed  handwritten (also called "holograph") \_\_\_\_\_

Do you have a living will or power of attorney for personal care?  Yes  No

Your legal representative for personal care \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Original document is located \_\_\_\_\_

A copy is located \_\_\_\_\_

Do you have a power of attorney for property?  Yes  No

Your legal representative for property \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Law firm \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

Original document is located \_\_\_\_\_

A copy is located \_\_\_\_\_

**Alternate contact**

Your legal representative \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Law firm \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_



# Funeral arrangements and organ donation

Have you made funeral arrangements?  Yes  No

Funeral home

Address

Phone

Email

Have you set out instructions for burial, cremation or funeral?  Yes  No

Where are these instructions written?  Your will  A letter

Document is located

Do you own a cemetery plot?  Yes  No

Plot is located

Have you provided for its ongoing care?  Yes  No

Deed to the plot is located

Do you want to donate your organs or body for transplant, research or education?  Yes  No

Where have you explained this?

Will  Organ donor card  Driver's licence  Your province's online donor registry



# Companies, employers & volunteer work

**Most recent company/employer**

Starting year – ending year

Address

Phone

Email

**Company/employer 2**

Starting year – ending year

Address

Phone

Email

**Company/employer 3**

Starting year – ending year

Address

Phone

Email

**Company/employer 4**

Starting year – ending year

Address

Phone

Email

**Company/employer 5**

Starting year – ending year

Address

Phone

Email

**Company/employer 6**

Starting year – ending year

Address

Phone

Email

Have you done volunteer work?  Yes  No

**Organization 1**

Starting year – ending year

Address

Phone

Email

**Organization 2**

Starting year – ending year

Address

Phone

Email

**Organization 3**

Starting year – ending year

Address

Phone

Email

**Organization 4**

Starting year – ending year

Address

Phone

Email



## Bank, credit union accounts &/or attach statements

### Account 1

Bank, credit union	Branch
Type of account <sup>1</sup>	Account #
Address	Phone
	Email

### Account 2

Bank, credit union	Branch
Type of account <sup>1</sup>	Account #
Address	Phone
	Email

### Account 3

Bank, credit union	Branch
Type of account <sup>1</sup>	Account #
Address	Phone
	Email

### Account 4

Bank, credit union	Branch
Type of account <sup>1</sup>	Account #
Address	Phone
	Email

### Account 5

Bank, credit union	Branch
Type of account <sup>1</sup>	Account #
Address	Phone
	Email

### Account 6

Bank, credit union	Branch
Type of account <sup>1</sup>	Account #
Address	Phone
	Email

<sup>1</sup> For example, chequing, savings.





# Scheduled payments

## Payment 1

Type of payment <sup>2</sup>	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? <input type="checkbox"/> Yes <input type="checkbox"/> No

## Payment 2

Type of payment <sup>2</sup>	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? <input type="checkbox"/> Yes <input type="checkbox"/> No

## Payment 3

Type of payment <sup>2</sup>	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? <input type="checkbox"/> Yes <input type="checkbox"/> No

## Payment 4

Type of payment <sup>2</sup>	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? <input type="checkbox"/> Yes <input type="checkbox"/> No

## Payment 5

Type of payment <sup>2</sup>	Paid to
Address	Phone
	Email
Account #	Amount \$
Due date	Automatic payment plan? <input type="checkbox"/> Yes <input type="checkbox"/> No

<sup>2</sup> For example, mortgage, rent, loan, bill.



# Debtors and creditors

## People who owe you money

<b>Debtor 1</b>	Amount \$
Address	Date of loan
	Phone, email
<b>Debtor 2</b>	Amount \$
Address	Date of loan
	Phone, email
<b>Debtor 3</b>	Amount \$
Address	Date of loan
	Phone, email

## People **you owe** money to

<b>Creditor 1</b>	Amount \$
Address	Date of loan
	Phone, email
<b>Creditor 2</b>	Amount \$
Address	Date of loan
	Phone, email
<b>Creditor 3</b>	Amount \$
Address	Date of loan
	Phone, email

Loan agreements and promissory notes are located

## Other financial commitments and contractual obligations

<b>Description of commitment or obligation 1</b>
Information is located
<b>Description of commitment or obligation 2</b>
Information is located
<b>Description of commitment or obligation 3</b>
Information is located



# Insurance

## Policies you own &/or attach policy summaries

### Policy 1

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

### Policy 2

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

### Policy 3

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

### Policy 4

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	



**Policy 5**

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

**Policy 6**

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

**Policy 7**

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

**Policy 8**

Insurance company	Policy #
Address	Phone or email
	Policy is located
Advisor who services policy	Phone or email
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	



## Group or association life insurance

### Policy 1

Company or association	Policy #
Address	Phone or email
	Policy is located
Beneficiary(ies) and their phone or email	

### Policy 2

Company or association	Policy #
Address	Phone or email
	Policy is located
Beneficiary(ies) and their phone or email	

### Policy 3

Company or association	Policy #
Address	Phone or email
	Policy is located
Beneficiary(ies) and their phone or email	

### Policy 4

Company or association	Policy #
Address	Phone or email
	Policy is located
Beneficiary(ies) and their phone or email	



# Hospital, medical, travel and other insurance

## Policy 1

Type of insurance <sup>3</sup>	Policy #
Insurance company	Phone
Address	Email
	Policy is located

## Policy 2

Type of insurance <sup>3</sup>	Policy #
Insurance company	Phone
Address	Email
	Policy is located

## Policy 3

Type of insurance <sup>3</sup>	Policy #
Insurance company	Phone
Address	Email
	Policy is located

## Policy 4

Type of insurance <sup>3</sup>	Policy #
Insurance company	Phone
Address	Email
	Policy is located

## Notes

<sup>3</sup> For example, hospital, medical, travel.



# Investments: Tax-free savings accounts (TFSAs)

&/or attach statements

## Investment 1

Financial company	Account #
Address	Phone or email
	Information is located
Individual TFSA or group TFSA? <input type="checkbox"/> Individual <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	

## Investment 2

Financial company	Account #
Address	Phone or email
	Information is located
Individual TFSA or group TFSA? <input type="checkbox"/> Individual <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	

## Investment 3

Financial company	Account #
Address	Phone or email
	Information is located
Individual TFSA or group TFSA? <input type="checkbox"/> Individual <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	

## Investment 4

Financial company	Account #
Address	Phone or email
	Information is located
Individual TFSA or group TFSA? <input type="checkbox"/> Individual <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	



# Registered retirement savings plans (RRSPs)

## Investment 1

Financial company	Account #
Address	Phone or email
	Information is located
Individual RRSP or group RRSP? <input type="checkbox"/> Individual <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

## Investment 2

Financial company	Account #
Address	Phone or email
	Information is located
Individual RRSP or group RRSP? <input type="checkbox"/> Individual <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

## Investment 3

Financial company	Account #
Address	Phone or email
	Information is located
Individual RRSP or group RRSP? <input type="checkbox"/> Individual <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

## Investment 4

Financial company	Account #
Address	Phone or email
	Information is located
Individual RRSP or group RRSP? <input type="checkbox"/> Individual <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	





# Pension and deferred profit-sharing plans, locked-in retirement accounts

## Investment 1

Company with plan	Account #
Address	Phone or email
	Information is located
Financial company	
Address	Phone or email
Beneficiary(ies) and their phone or email	

## Investment 2

Company with plan	Account #
Address	Phone or email
	Information is located
Financial company	
Address	Phone or email
Beneficiary(ies) and their phone or email	

## Investment 3

Company with plan	Account #
Address	Phone or email
	Information is located
Financial company	
Address	Phone or email
Beneficiary(ies) and their phone or email	

## Investment 4

Company with plan	Account #
Address	Phone or email
	Information is located
Financial company	
Address	Phone or email
Beneficiary(ies) and their phone or email	



# Registered education savings plans (RESPs)

## Investment 1

Financial company	Account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Type of RESP? <input type="checkbox"/> Individual <input type="checkbox"/> Family <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Student beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

## Investment 2

Financial company	Account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Type of RESP? <input type="checkbox"/> Individual <input type="checkbox"/> Family <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Student beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

## Investment 3

Financial company	Account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Type of RESP? <input type="checkbox"/> Individual <input type="checkbox"/> Family <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Student beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	

## Investment 4

Financial company	Account #
Address	Phone or email
	Information is located
Advisor who services account	Phone or email
Type of RESP? <input type="checkbox"/> Individual <input type="checkbox"/> Family <input type="checkbox"/> Group	Company or group name?
Do you invest regularly using automatic payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How often?	What account is payment made from?
Student beneficiary(ies) and their phone or email	
<hr/>	
<hr/>	



# Home and real estate

## Property 1

Address \_\_\_\_\_ Type of real estate<sup>6</sup> \_\_\_\_\_

Title is held by  You  Spouse  Joint  Corporation \_\_\_\_\_

Is there a mortgage?  Yes  No \_\_\_\_\_

Mortgage held by \_\_\_\_\_ Phone or email \_\_\_\_\_

Address \_\_\_\_\_

## Property 2

Address \_\_\_\_\_ Type of real estate<sup>6</sup> \_\_\_\_\_

Title is held by  You  Spouse  Joint  Corporation \_\_\_\_\_

Is there a mortgage?  Yes  No \_\_\_\_\_

Mortgage held by \_\_\_\_\_ Phone or email \_\_\_\_\_

Address \_\_\_\_\_

## Property 3

Address \_\_\_\_\_ Type of real estate<sup>6</sup> \_\_\_\_\_

Title is held by  You  Spouse  Joint  Corporation \_\_\_\_\_

Is there a mortgage?  Yes  No \_\_\_\_\_

Mortgage held by \_\_\_\_\_ Phone or email \_\_\_\_\_

Address \_\_\_\_\_

## Property 4

Address \_\_\_\_\_ Type of real estate<sup>6</sup> \_\_\_\_\_

Title is held by  You  Spouse  Joint  Corporation \_\_\_\_\_

Is there a mortgage?  Yes  No \_\_\_\_\_

Mortgage held by \_\_\_\_\_ Phone or email \_\_\_\_\_

Address \_\_\_\_\_

## Property 5

Address \_\_\_\_\_ Type of real estate<sup>6</sup> \_\_\_\_\_

Title is held by  You  Spouse  Joint  Corporation \_\_\_\_\_

Is there a mortgage?  Yes  No \_\_\_\_\_

Mortgage held by \_\_\_\_\_ Phone or email \_\_\_\_\_

Address \_\_\_\_\_

Deeds are located \_\_\_\_\_

Copies of mortgages are located \_\_\_\_\_

Property insurance policies are located \_\_\_\_\_

Land surveys are located \_\_\_\_\_

Property tax receipts are located \_\_\_\_\_

Leases are located \_\_\_\_\_

Information on building costs is located \_\_\_\_\_

<sup>6</sup> For example, house, condo, vacation home.



## Personal property

List of vehicles you own or lease

---

Vehicle registrations are located

---

Vehicles' bills of sale or lease and insurance policies are located

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Jewelry, stamp collections, coin collections and other valuables are located

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Are household furnishings insured?  Yes  No

---

Furnishings' bills of sale and insurance policies, and list of items in your home, are located

---

---

## Other assets

## Safe deposit box

Do you have a safe deposit box?  Yes  No

Box is located

---

Names of others who have access to it

---

Keys are located

---

List of contents is located

---



## Email, social media, digital assets

Your digital assets include online accounts, electronic files and data.  
 If information on these assets is available somewhere else, please note the location below.

Do you have an online password manager for your digital assets?  Yes  No

Company	Account # or user ID	Password
---------	----------------------	----------

Is information on your digital assets available somewhere else?  Yes  No

Information is located

### Email accounts

Email address	Password
Email address	Password
Email address	Password
Email address	Password

### Social media accounts

Company	User ID	Password
Company	User ID	Password
Company	User ID	Password
Company	User ID	Password
Company	User ID	Password
Company	User ID	Password
Company	User ID	Password

### Other online accounts

For example, CRA, PayPal, Bitcoin, data storage, photos.

Company	Type of account	Account #
User ID	Password	
Company	Type of account	Account #
User ID	Password	
Company	Type of account	Account #
User ID	Password	
Company	Type of account	Account #
User ID	Password	
Company	Type of account	Account #
User ID	Password	
Company	Type of account	Account #
User ID	Password	



## Charitable gifts

<b>Charity 1</b>	Information is located
Address	Phone or email
<b>Charity 2</b>	Information is located
Address	Phone or email
<b>Charity 3</b>	Information is located
Address	Phone or email
<b>Charity 4</b>	Information is located
Address	Phone or email

## Trust funds

<b>Purpose of trust 1</b>	
Agreement was drawn up by	
Trust papers are located	Phone or email
<b>Purpose of trust 2</b>	
Agreement was drawn up by	
Trust papers are located	Phone or email
<b>Purpose of trust 3</b>	
Agreement was drawn up by	
Trust papers are located	Phone or email
<b>Purpose of trust 4</b>	
Agreement was drawn up by	
Trust papers are located	Phone or email



# Memberships

## Club or association 1

Address

Phone

Email

## Club or association 2

Address

Phone

Email

## Club or association 3

Address

Phone

Email

## Club or association 4

Address

Phone

Email

# Subscriptions

## Publication 1

Address

Phone

Email

## Publication 2

Address

Phone

Email

## Publication 3

Address

Phone

Email

## Publication 4

Address

Phone

Email



# Notes