Location of valuable papers and assets

This list is designed to help you and your family keep track of your important documents so they can be found quickly when needed.

On this side of the form, complete all the applicable locations where you keep your important documents.

On the other side of the form, circle the letter (A,B,C,D,E, or F) that corresponds to the locations you list below.

Give a copy of this list to your spouse, the executor of your will, or anyone else you want to have access to your important documents. You should also keep a copy for yourself.

_										
(A)	Residence	Street number	Street name					Ap	partment number	
		City	I		Pro	ovince		Postal code		
		Location of docum	nents in your residence							
\bigcirc B	Safe deposit box	Bank name Box number								
		Phone number	Phone number Street number Street name							
		City			Pro	ovince		Postal code		
\bigcirc	Current or former employer									
	employer	Contact person	Contact person			Phone number			Extension	
		Street number	Street name		l					
		City	1		Pro	ovince		Postal code		
D	Lawyer	Firm name								
		Lawyer's name			Pho	Phone number			Extension	
		Street number	Street name							
		City	1		Pro	ovince		Postal code		
E	Accountant									
		Accountant's name			Pho	Phone number			Extension	
		Street number Street name								
	Financial advisor	City			Pro	Province Postal code				
F		Name/Firm				Phone number				
		Street number	treet number Street name							
		City	1		Pro	ovince		Postal code		

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(A) Residence	C Current or former employer E Accountant						
B Safe deposit box	D Lawyer	F Financial advisor					
Wills		Housing					
My will (original)	ABCDEF	Titles and deeds to					
Spouse's will (original)	ABCDEF	real estate and land	A B C D E F				
Copies of wills	ABCDEF	Rental property records	A B C D E F				
Burial instructions	ABCDEF	Notes and other loan agreements,					
List of special bequests	ABCDEF	including mortgages	A B C D E F				
		Rental/lease agreement	ABCDEF				
Insurance		List (and proof) of					
Group life insurance	ABCDEF	valuable possessions	A B C D E F				
Individual life insurance	ABCDEF						
Other death benefits	ABCDEF	Personal					
Property and casualty insurance	ABCDEF	Birth certificates	ABCDEF				
Health insurance policy	ABCDEF	Passports	ABCDEF				
Homeowner's insurance policy	ABCDEF	Citizenship papers	ABCDEF				
Car insurance policies	ABCDEF	Adoption papers	ABCDEF				
Auto ownership records	ABCDEF	Marriage certificate	ABCDEF				
Nato ownership records	N D O D E I	Children's birth certificates	ABCDEF				
Financial		Children's adoption papers	ABCDEF				
		Divorce/separation records	ABCDEF				
Chequing and savings accounts	ABCDEF	Names and addresses of	N D O D L 1				
Cheque books	ABCDEF	relatives/friends	ABCDEF				
Savings passbook	ABCDEF	relatives/merias	N D O D L 1				
Bank statements, cancelled cheques	ABCDEF	Other					
List of credit cards	ABCDEF						
Certificates of deposit	ABCDEF		ABCDEF				
Record of investment securities	ABCDEF		ABCDEF				
Brokerage account records	ABCDEF		_ A B C D E F				
Stock certificates	ABCDEF		ABCDEF				
Mutual fund shares	ABCDEF		ABCDEF				
Bonds	ABCDEF		ABCDEF				
OMERS pension	ABCDEF		ABCDEF				
RRSPs	ABCDEF		ABCDEF				
Canada Pension Plan	ABCDEF		ABCDEF				
Other pension	ABCDEF		ABCDEF				