

Fill out this document on your own or together with a partner.

Personal Information

Contacts/Information/Location of documents

Birth certificate

Social Insurance Number

Military service records

Driver's licence

Passport/Citizenship papers

Marriage Licence

Divorce records

Other Important Documents

Contacts/Information/Location of documents

Death certificate (for deceased spouse)

Will

Executor/Trustee

Pre-arranged funeral and insurance

Cemetery plot

Pets/Veterinarian

Pre- or post-nuptial agreements

Power of Attorney

Custody papers

Financial Information and Assets

Contacts/Information/Location of documents

Bank account(s)

Investments

(for example, RRSPs, ETFs, stocks, mutual funds, bonds)

Debt

(credit card/lines of credit)

Life insurance policy

Pension(s)/Benefits

Safe deposit box(es)

Previous year's tax returns

Financial Contacts

Name and contact information

Financial planner and advisor

Accountant

Lawyer

Life insurance agent

Personal items

Contacts/Information/Location of documents

Location of personal items or keepsakes
(especially those identified in the will)

Home and Other Properties

Contacts/Information/Location of documents

List of all properties

Mortgage or rental documents

Utility bills

(list providers and account numbers
for power, cable, phone, internet,
water/sewer, etc.)

Homeowners or tenants insurance policy

Property tax bill(s)

Deeds/Titles for properties

Business owner information

Automobile and Recreational Vehicles

Contacts/Information/Location of documents

Registration
(list all vehicles)

Loans/Financing

Insurance



Share this
information with
someone you trust
and keep it in a
safe place.

Health Information

Contacts/Information/Location of documents

Name of doctor(s)

Medications

Medicare number

Medical records

Health insurance

Disability Insurance



by the Financial and Consumer Services
Commission of New Brunswick

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