

# Life and Legacy Binder Table of Contents for

Date of Last Update: \_\_\_\_\_

## Table of Contents

- A. Will (Copy ) – Location of original: \_\_\_\_\_ ☐
- B. Power of Attorney (Copy) – Location of original: \_\_\_\_\_ ☐
- C. Health Care Directive / Advance Care Plan (Note who has been given copies) ☐
- D. Personal Directive (Note who has been given copies) ☐
- E. Funeral Plan (Is funeral prepaid - No ☐ Yes ☐ Name of funeral home \_\_\_\_\_) ☐
- F. Bank account listing<sup>1</sup> (or copies of statements<sup>2</sup> to show details) ☐
- G. Employer pension plan or savings account documentation ☐
- H. Investment account listing<sup>1</sup> (or copies of statements – non-registered, RRSP, RRIF , FHSA , RDSP, other ☐
- I. Cryptocurrency account details ☐
- J. Real estate details<sup>1</sup> (copies of property tax statements<sup>2</sup> for details; location of deeds, details of purchase dates, original costs or fair value at date a gift or inheritance was received and subsequent improvement costs<sup>3</sup>) ☐
- K. Details of business interests and succession planning documents ☐
- L. Insurance policies<sup>2</sup> (life, critical illness, home, auto, other) ☐
- M. Mortgage, loan and credit card documents<sup>2</sup> ☐
- N. Copies of other important documents (e.g., birth and marriage certificates, military records, marriage and separation agreements, trust documents) ☐
- O. Listing of important advisors with contact information ☐
- P. Listing of social media accounts, email addresses and web sites, etc. with access information<sup>4</sup> ☐
- Q. Other: \_\_\_\_\_ ☐
- R. Other: \_\_\_\_\_ ☐
- S. Other: \_\_\_\_\_ ☐
- T. Other: \_\_\_\_\_ ☐

<sup>1</sup> Where bank and investment accounts, real estate titles and other assets are in joint name, include a note as to whether the balance is still considered 100% beneficially owned by you, or is it owned equally by all named owners. Also indicate how you wish joint accounts to be distributed on your death – directly to the joint owner(s) or in accordance with your Last Will and Testament.

<sup>2</sup> Copies of statements and documents for this purpose are useful to obtain account ownership, number and other details, and do not necessarily need to be the most recent, although you should be review regularly to add new accounts or remove accounts that no longer exist.

<sup>3</sup> Costs of assets are required for income tax calculations. If any real estate was used by your family for operating their own farm, indicate the areas used and dates of such use for tax considerations.

<sup>4</sup> Passwords should be only be stored in a secure location, not here if this binder is generally accessible.