

My Family Inventory

*Using this List as a Guide, put the information into a separate document.
Leave out what Does Not Apply to You.*

Personal Information:

- Date you prepared this document
- Your name
- Your Date of Birth
- Your Place of Birth
- Your Social Insurance No.
- Repeat these 4 points if you have a spouse
- Repeat these 4 points for each child (note if living at home)

Professional Advisors:

- Contact information for your Accountant
- Contact information for your Lawyer
- Contact information for your Investment Advisor
- Banking information including acct numbers, branches

Location of Other Important Documents:

- Birth certificate(s) for yourself and spouse
- Children's birth certificates
- Marriage Licence
- Medical Records
- Doctors name(s) and phone numbers
- Citizenship papers or passport(s)
- Income Tax Returns
- Custody or Adoption papers
- Pre-Nuptial or Cohabitation papers
- Separation or Divorce papers

Credit Information:

- All banking information re: Mortgage(s) + amount owing
- All banking information re: Credit Lines or Demand Loans
- All bank machine cards, issuer and card numbers
- All credit cards, issuer, card numbers, expiry date and credit limit

Investment Information: (for each one, list)

- Firm name
- Type of investment
- Account No.
- Ownership type (single, joint?). If registered, note beneficiary
- Value

Personal Assets: (Cars, Jewelry, Art, etc.)

- Item description
- Value
- Location
- Intended beneficiary

Real Estate:

- Principal Residence
 - Address
 - Date of Purchase
 - Title held by
 - Mortgage held by
 - Deed location
 - Purchase price
 - Current market value
- Other Properties
 - Address
 - Date of Purchase
 - Title held by
 - Mortgage held by
 - Deed location
 - Purchase price
 - Current market value

Pension Plans:

- Company name
- Contact name and phone number
- Plan type
- Beneficiary

Business Investments: (Private Corporations)

- Company Name
- Type - (sole proprietorship, partnership, corporation)

- % Interest held
- Location of Documents
- Legal Counsel

Life Insurance:

- Individual Coverage
 - Issuer
 - Insured
 - Agent's name & Phone number
 - Insurance type - (term or permanent)
 - Policy No.
 - Face value
 - Cash surrender value
 - Beneficiary
 - Death benefit
 - Contract location

- Group Coverage
 - Issuer
 - Insured
 - Agent's name & Phone number
 - Insurance type - (term or permanent)
 - Policy No.
 - Face value
 - Cash surrender value
 - Beneficiary
 - Death benefit
 - Contract location

Other Insurance:

- Other Life Coverage (Travel, Credit Cards)
 - Issuer
 - Insured
 - Insurance type
 - Policy No.
 - Death benefit
 - Location of Contract

- Health Insurance
 - Health Care Card Number & location
 - Spouse's Care Card Number & location

- Group Health Insurance
 - Insurance Company
 - Contact name and phone number
 - Group
 - Coverage for

- Private Disability Insurance
 - Insurance Company
 - Contact name and phone number
 - Coverage type/Person Insured
 - Coverage \$ Benefit Period
 - Annual Premium \$
 - Policy No.

- Critical Illness/Disability Insurance
 - Insurance Company
 - Contact name and phone number
 - Certificate/Policy No.
 - Coverage type/Person insured
 - Coverage \$ Benefit Period
 - Annual Premium \$

- Other Insurance: (Mortgage, Credit Cards, etc)
 - Insurance Company
 - Contact name
 - Coverage for
 - Coverage \$
 - Policy No.

- Property Insurance (Home/Auto/Other)
 - Property description
 - Insurance Company
 - Contact name and phone number
 - Policy No.
 - Contract location

Pre-Planned Funeral

- Funeral Home
- Contact name & Phone number
- Details
- Cemetery plot
- Plot location
- Deed location

Your Will

- Date of Last Will/Codicil
- Will location
- Lawyer's name & phone number
- Lawyer's address
- Executors(s) or Trustee(s) & phone numbers
- Address(es) of Executors
- Beneficiaries
- Name, phone & address for each one

Will Instructions/Special Clauses

Your Spouse's Will (Follow same info as your Will)

Power(s) of Attorney or Representation Agreement(s)

- Location and type of agreement
- Powers given to: name, phone & address
- Lawyer's name, phone & address
- Duplicate this info for spouse

Other Information

- Indicate any other outstanding debts, child support, trusts, etc.