

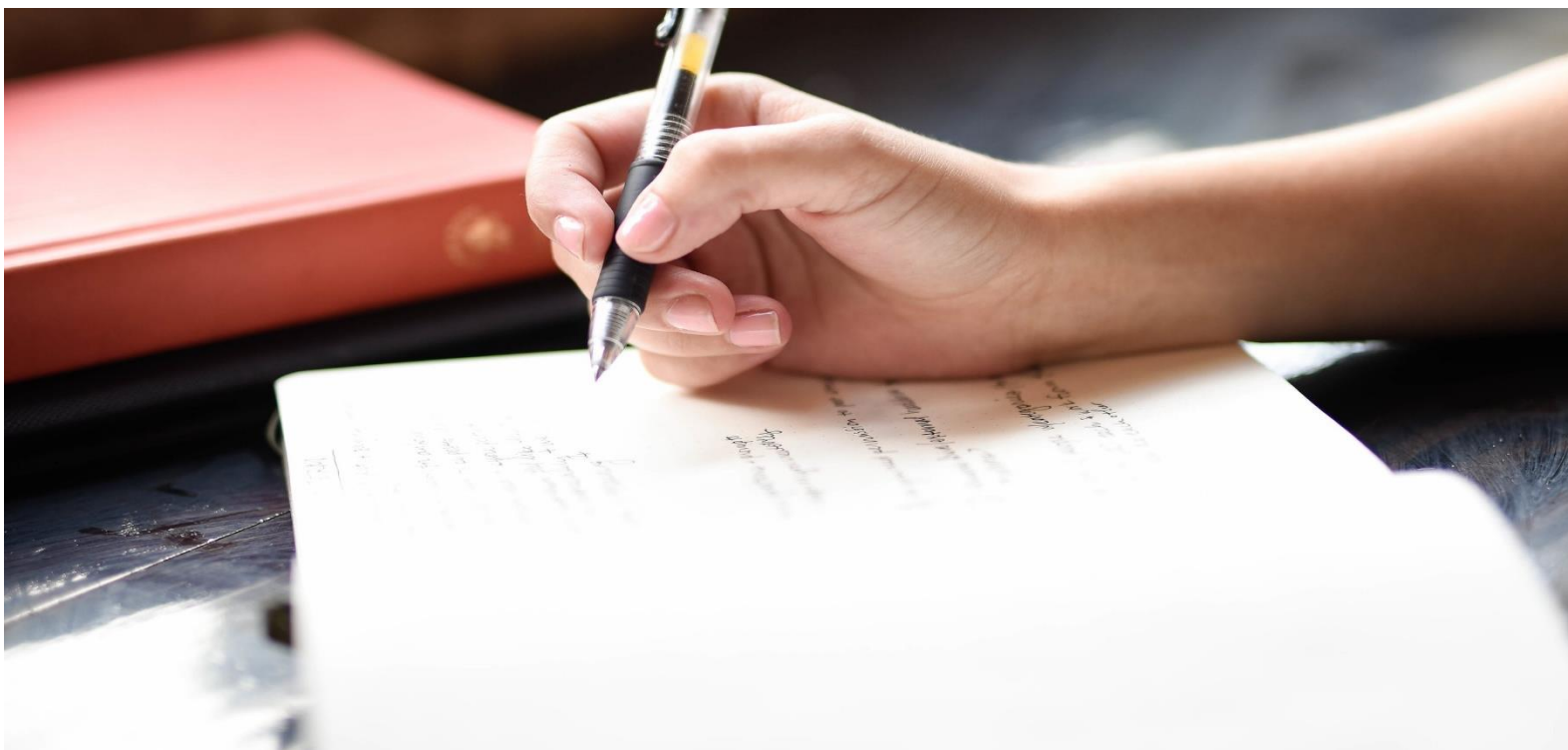


Metherell Financial

829 Brant Street, Burlington, ON L7R 2J4

Phone (905) 632-4950

www.metherellfinancial.com



Personal Estate Information Booklet

Personal Information

Legal Name: _____

Date of Birth: _____ Place of Birth: _____

Health Card Number: _____

Driver's License Number: _____

Passport Number: _____

SIN Number: _____

Location of Birth Certificate: _____

Location of Marriage Certificate: _____

Location of Deed to Property: _____

Who Should be Notified

In the event of illness, accident or death

Name: _____

Contact: _____

Name: _____

Contact: _____

Name: _____

Contact: _____

Name: _____

Contact: _____

Name: _____

Contact: _____

Name: _____

Contact: _____

Name: _____

Contact: _____

Name: _____

Contact: _____

Name: _____

Contact: _____

Name: _____

Contact: _____

Legal Information

Date of last Will update? _____

Location of Will: _____

Executors: _____

Power of Attorney: For Health: _____ For Finances: _____

Lawyer Name: _____ Phone Number: _____

Financial Information

Chequing and Savings Accounts:

Institution: _____ Account # _____

Institution: _____ Account # _____

Institution: _____ Account # _____

Institution: _____ Account # _____

Institution: _____ Account # _____

Institution: _____ Account # _____

Bank Contact: _____ Phone Number: _____

Debts – Mortgage, Line of Credit, Loans:

Institution: _____ Account # _____

Institution: _____ Account # _____

Institution: _____ Account # _____

Institution: _____ Account # _____

Institution: _____ Account # _____

Bank Contact: _____ Phone Number: _____

Credit Cards:

Institution: _____ Card # _____
Institution: _____ Card # _____
Institution: _____ Card # _____
Institution: _____ Card # _____
Institution: _____ Card # _____
Institution: _____ Card # _____

Investment Accounts:

Type: _____ Institution: _____ Account # _____
Type: _____ Institution: _____ Account # _____
Type: _____ Institution: _____ Account # _____
Type: _____ Institution: _____ Account # _____
Type: _____ Institution: _____ Account # _____
Type: _____ Institution: _____ Account # _____
Type: _____ Institution: _____ Account # _____
Type: _____ Institution: _____ Account # _____
Investment Advisor: _____ Phone Number: _____

Insurance Policies:

Type: _____ Institution: _____ Policy # _____
Type: _____ Institution: _____ Policy # _____
Type: _____ Institution: _____ Policy # _____
Type: _____ Institution: _____ Policy # _____
Insurance Advisor: _____ Phone Number: _____

Employer Accounts:

Employer Name: _____ Benefit Provider: _____
Group RRSP: _____ Life Insurance: _____
Pension: _____ Benefit Plan: _____
HR Contact: _____ Phone Number: _____

Tax Information

Location of tax information: _____
CRA Online Login Information: _____
Accountant: _____ Phone Number: _____

Other

Auto Insurance:
Provider: _____ Policy #: _____
Home Insurance:
Provider: _____ Policy #: _____
Monthly or Annual Membership Fees: _____

Special Bequests:

Funeral Arrangements

Prepaid Funeral?

Funeral Home: _____

Invoice or Contract Number: _____

Contact Person: _____ Phone Number: _____

Prepaid Resting Place?

Cemetery: _____

Invoice or Contract Number: _____

Contact Person: _____ Phone Number: _____

Final Wishes

Desired Funeral Arrangements (Style - Casual Celebration, Church Service;

Location; Specific Readings, Other Details, etc): _____

Obituary Requests (what to be included/excluded, which newspapers to publish in):

Do you wish to be cremated? Yes No

Desired resting place: _____

Other notes or wishes: _____

Contact us today for your estate planning needs



Metherell Financial

Helping individuals and families realize their financial dreams and
mitigate financial stresses!

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