

COLLINS BARROW

PERSONAL DOCUMENTS CHECKLIST



Collins Barrow

Chartered Accountants

Personal Information:

Your Name: <input type="text"/>	SIN Number: <input type="text"/>
Spouse's Name: <input type="text"/>	SIN Number: <input type="text"/>
Child's Full Name: <input type="text"/>	SIN Number: <input type="text"/>
Child's Full Name: <input type="text"/>	SIN Number: <input type="text"/>
Child's Full Name: <input type="text"/>	SIN Number: <input type="text"/>
Child's Full Name: <input type="text"/>	SIN Number: <input type="text"/>

Date of Will: _____

Location of Will: _____

Executors/Estate Trustees: _____

Name: _____ Telephone: _____

Address: _____

Name: _____ Telephone: _____

Address: _____

Name: _____ Telephone: _____

Address: _____

Name: _____ Telephone: _____

Address: _____

Notes of deceased beneficiaries, changes of address, etc.: _____

Special wishes or requirements (e.g. any charity to benefit in lieu of flowers, etc.): _____

Funeral Wishes (e.g. cremation of burial, suggested funeral directors, suggested location of service, funeral plot owned): _____

Personal articles distribution wishes: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Item: _____ To whom: _____

Doctor: _____

Name: _____ **Telephone:** _____

Address: _____

Name: _____ **Telephone:** _____

Address: _____

Lawyer: _____

Name: _____ **Telephone:** _____

Address: _____

Accountant: _____

Name: _____ **Telephone:** _____

Address: _____

Bankers: _____

Name: _____ **Telephone:** _____

Address: _____

Name: _____ **Telephone:** _____

Address: _____

Stock Broker: _____

Name: _____ **Telephone:** _____

Address: _____

Insurance Agent: _____

Name: _____ **Telephone:** _____

Address: _____

Principal Residence *(Do not list if property owned 100% by spouse):* _____

Address: _____

Ownership: _____ **Co-Owner:** _____

Subject to mortgage?: _____ **Mortgage Number:** _____

Mortgagee or Lender: _____

Mortgagee/Lender Address: _____

Insurance company if mortgage is insured: _____

Other properties: _____

Address: _____

Ownership: _____ **Co-Owner:** _____

Subject to mortgage?: _____ **Mortgage Number:** _____

Mortgagee or Lender: _____

Mortgagee/Lender Address: _____

Insurance company if mortgage is insured: _____

Bank Accounts (State if jointly held "J"): _____

Financial Institution: _____ Account Number: _____

Address: _____

Financial Institution: _____ Account Number: _____

Address: _____

Financial Institution: _____ Account Number: _____

Address: _____

Financial Institution: _____ Account Number: _____

Address: _____

Term Deposits, GICs (State if jointly held "J"): _____

Financial Institution: _____ Account Number: _____

Address: _____

Financial Institution: _____ Account Number: _____

Address: _____

Financial Institution: _____ Account Number: _____

Address: _____

Financial Institution: _____ Account Number: _____

Address: _____

Stocks (State if jointly held "J"): _____

of shares: _____ Class: _____ Company: _____

Location of certificate: _____

of shares: _____ Class: _____ Company: _____

Location of certificate: _____

of shares: _____ Class: _____ Company: _____

Location of certificate: _____

of shares: _____ Class: _____ Company: _____

Location of certificate: _____

of shares: _____ Class: _____ Company: _____

Location of certificate: _____

of shares: _____ Class: _____ Company: _____

Location of certificate: _____

of shares: _____ Class: _____ Company: _____

Location of certificate: _____

of shares: _____ Class: _____ Company: _____

Location of certificate: _____

of shares: _____ Class: _____ Company: _____

Location of certificate: _____

Bonds, Treasury Bills, etc. (State if jointly held "J"):

Face Value:	Interest Rate:	Name of Issuer:
Maturity Date:	Location of certificate:	
Face Value:	Interest Rate:	Name of Issuer:
Maturity Date:	Location of certificate:	
Face Value:	Interest Rate:	Name of Issuer:
Maturity Date:	Location of certificate:	
Face Value:	Interest Rate:	Name of Issuer:
Maturity Date:	Location of certificate:	
Face Value:	Interest Rate:	Name of Issuer:
Maturity Date:	Location of certificate:	
Face Value:	Interest Rate:	Name of Issuer:
Maturity Date:	Location of certificate:	
Face Value:	Interest Rate:	Name of Issuer:
Maturity Date:	Location of certificate:	
Face Value:	Interest Rate:	Name of Issuer:
Maturity Date:	Location of certificate:	
Face Value:	Interest Rate:	Name of Issuer:
Maturity Date:	Location of certificate:	

Business Interests:

Name of operations:	Corporate form:
% ownership:	Location of business records:
Information Contact Person:	Contact Phone:
Other Information:	
Name of operations:	Corporate form:
% ownership:	Location of business records:
Information Contact Person:	Contact Phone:
Other Information:	
Name of operations:	Corporate form:
% ownership:	Location of business records:
Information Contact Person:	Contact Phone:
Other Information:	
Name of operations:	Corporate form:
% ownership:	Location of business records:
Information Contact Person:	Contact Phone:
Other Information:	

Other Investments (i.e. RRSP, RRIF, DPSP, MURB, RPP, loans and mortgages receivable):

Life Insurance Policies:

Company:		
Policy Number:		Type:
Company:		
Policy Number:		Type:
Company:		
Policy Number:		Type:
Company:		
Policy Number:		Type:

Share certificates, investment certificates, insurance policies, etc.:

Safety deposit box (e.g. location of keys):

Personal papers (birth certificates, marriage certificate, divorce papers, maintenance/alimony agreement, partnership agreement):

Recent income tax returns:

Others (i.e. power of attorney, passport):

List type of liability, location of debt documents, contact person, etc.
(Consider: calls on MURBs/Oil and Gas deals, car/business loans, etc.)

Other information that might be useful: