

# Personal Information Inventory

OSC

Ontario  
Securities  
Commission



Your Personal Information Inventory is a confidential document created to help a trusted contact locate your personal and financial accounts and records in the event that you are unable to provide guidance.

Once completed, this document will contain sensitive information and should be stored in a safe and secure location. Do not store or share the completed document electronically, and avoid making copies. Tell a trusted contact, such as a family member or close friend how to access the document, and take a moment to discuss what you expect of them.

Remember to review your Personal Information Inventory periodically to ensure the information is up to date.

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Name

Last Updated

Personal Information

My Information

Full Name	Previous Name (if applicable)
Home Phone	Cell Phone
Address	

Birth Certificate

Birth Certificate Location
Location & Date of Birth

Social Insurance Number

SIN Card Location
SIN Number

Driver's Licence

Card Location
Licence Number
Expiration Date

Health Card

Card Location
Card Number
Expiration Date

Passport

Passport Location
Passport Number
Expiration Date

Citizenship Certificate

Certificate Location
Certificate Number
Date of Citizenship

Personal Tax Returns

Location of Documents

Military Service Records

Location of Documents	
Date of Service	Date of Discharge

## Legal Documents

### Will/Trust

Will/Trust Location

Legal Counsel Name

Legal Counsel Contact Info

### Power of Attorney – Property

Location of Documents

Attorney Name

Attorney Contact Info

### Death Certificate (for deceased spouse)

Certificate Location

Date of Death

### Pre/Post-nuptial Agreements

Location of Documents

### Custody/Adoption Records

Location of Documents

### Real Estate Deeds, Titles & Plot Lines

Location of Documents

### Power of Attorney – Personal Care

Location of Documents

Attorney Name

Attorney Contact Info

### Marriage Certificate

Certificate Location

Date of Event

### Divorce Agreement

Location of Documents

Date of Event

### Birth Certificates (for children)

Location of Documents

### Mortgage Closing Documents

Location of Documents

### Cemetery Deed/Funeral Arrangements

Location of Documents

Insurance

Personal Insurance (life/disability/long-term care)

Insurance Company
Policy Number
Policy Period
Contact Info
Location of Documents

Home/Rental Insurance

Insurance Company
Policy Number
Policy Period
Contact Info
Location of Documents

Mortgage Insurance

Insurance Company
Policy Number
Policy Period
Contact Info
Location of Documents

Health Insurance

Insurance Company
Policy Number
Policy Period
Contact Info
Location of Documents

Auto Insurance

Insurance Company
Policy Number
Policy Period
Contact Info
Location of Documents

Other Insurance

Insurance Company	Insurance Type
Policy Number	
Policy Period	
Contact Info	
Location of Documents	

Professional Advisors

Executor

Name

Contact Info

Notes

Accountant

Name

Contact Info

Notes

Real Estate Lawyer

Name

Contact Info

Notes

Financial Advisor

Name

Contact Info

Notes

Estate Planning Lawyer

Name

Contact Info

Notes

Other

Name

Contact Info

Notes

Medical Professionals

Primary Physician

Name

Contact Info

Notes

Eye Care

Name

Contact Info

Notes

Medical Specialist

NameMedical Specialty

Contact Info

Notes

Medical Specialist

NameMedical Specialty

Contact Info

Notes

Dental Care

Name

Contact Info

Notes

Medical Specialist

NameMedical Specialty

Contact Info

Notes

Medical Specialist

NameMedical Specialty

Contact Info

Notes

Medical Specialist

NameMedical Specialty

Contact Info

Notes

Assets

Chequing Account ☐ Joint ☐ Individual

Financial Institution

Account Number

Contact Info

Savings Account ☐ Joint ☐ Individual

Financial Institution

Account Number

Contact Info

TFSA

Financial Institution

Account Number

Contact Info

RRSP/RRIF

Financial Institution

Account Number

Contact Info

Chequing Account ☐ Joint ☐ Individual

Financial Institution

Account Number

Contact Info

Savings Account ☐ Joint ☐ Individual

Financial Institution

Account Number

Contact Info

TFSA

Financial Institution

Account Number

Contact Info

RRSP/RRIF

Financial Institution

Account Number

Contact Info

## Assets (Continued)

### Spousal RRSP/RRIF

Beneficiary

Financial Institution

Account Number

Contact Info

### RESP

Beneficiary

Financial Institution

Account Number

Contact Info

### RDSP

Beneficiary

Financial Institution

Account Number

Contact Info

### Pension

Pension Provider

Client Number

Contact Info

### LIRA/LIF

Financial Institution

Account Number

Contact Info

### RESP

Beneficiary

Financial Institution

Account Number

Contact Info

### Non-Registered Investments

☐ Joint ☐ Individual

Financial Institution

Account Number

Contact Info

### Annuity

☐ Joint ☐ Individual

Financial Institution

Account Number

Contact Info



Assets (Continued)

Safe Deposit Box

Financial Institution

Box Number

Contact Info

Key Location

Tangible Property (real estate, vehicles, etc.)

Type of Asset

Location

Notes

Notes

Other

Type of Asset

Location

Notes

Other

Type of Asset

Location

Notes

Tangible Property (real estate, vehicles, etc.)

Type of Asset

Location

Notes

Tangible Property (real estate, vehicles, etc.)

Type of Asset

Location

Notes

Other

Type of Asset

Location

Notes

Other

Type of Asset

Location

Notes

Debts

Credit Card

Lender Name

Account Number

Contact Info

Credit Card

Lender Name

Account Number

Contact Info

Line of Credit

Lender Name

Account Number

Contact Info

Mortgage

Lender Name

Account Number

Contact Info

Credit Card

Lender Name

Account Number

Contact Info

Credit Card

Lender Name

Account Number

Contact Info

Line of Credit

Lender Name

Account Number

Contact Info

Mortgage

Lender Name

Account Number

Contact Info

Debts (Continued)

Reverse Mortgage

Lender Name

Account Number

Contact Info

Vehicle Loan/Lease

Lender Name

Account Number

Contact Info

Other

Lender Name

Account Number

Contact Info

Other

Lender Name

Account Number

Contact Info

Payday Loan

Lender Name

Account Number

Contact Info

Vehicle Loan/Lease

Lender Name

Account Number

Contact Info

Other

Lender Name

Account Number

Contact Info

Other

Lender Name

Account Number

Contact Info

Utilities & Services

Power

Provider Name

Account Number

Contact Info

Water/Sewage

Provider Name

Account Number

Contact Info

Home Phone

Provider Name

Account Number

Contact Info

Other

Provider Name

Service Type

Account Number

Contact Info

Gas

Provider Name

Account Number

Contact Info

Internet/Cable

Provider Name

Account Number

Contact Info

Cell Phone

Provider Name

Account Number

Contact Info

Other

Provider Name

Service Type

Account Number

Contact Info

## Digital Accounts

### Computers/Mobile Devices

Device Type	Notes
Device Type	Notes
Device Type	Notes
Device Type	Notes

### Email

Email Provider	Email Address
Email Provider	Email Address

### Media Subscriptions (news, movies, music, books, games, etc.)

Service Name & URL	Name/Email associated with the account
Service Name & URL	Name/Email associated with the account
Service Name & URL	Name/Email associated with the account
Service Name & URL	Name/Email associated with the account
Service Name & URL	Name/Email associated with the account

### Social Media

Service Name & URL	Username/Email associated with the account
Service Name & URL	Username/Email associated with the account
Service Name & URL	Username/Email associated with the account
Service Name & URL	Username/Email associated with the account

[illegible]

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