

Personal Information Inventory



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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.

Personal Information	2
Legal Documents	3
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Assets	7
Debts	10
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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

Social Insurance Number

Location & Date of Birth

SIN Card Location

Driver's Licence

Card Location

Health Card

Licence Number

Card Location

Expiration Date

Card Number

Passport

Expiration Date

Passport Location

Certificate Location

Passport Number

Certificate Number

Expiration Date

Date of Citizenship

Personal Tax Returns

Military Service Records

Location of Documents

Location of Documents

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



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Insurance

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

Insurance Company

Policy Number

Policy Period

Contact Info

Location of Documents

Health Insurance

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

Auto 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

Other Insurance

Insurance Company

Insurance Type

Policy Number

Policy Period

Contact Info

Location of Documents

Professional Advisors

Executor

Name _____

Contact Info _____

Notes _____

Financial Advisor

Name _____

Contact Info _____

Notes _____

Accountant

Name _____

Contact Info _____

Notes _____

Estate Planning Lawyer

Name _____

Contact Info _____

Notes _____

Real Estate Lawyer

Name _____

Contact Info _____

Notes _____

Other

Name _____

Contact Info _____

Notes _____

Medical Professionals

Primary Physician

Name _____

Contact Info _____

Notes _____

Dental Care

Name _____

Contact Info _____

Notes _____

Eye Care

Name _____

Contact Info _____

Notes _____

Medical Specialist

Name _____ Medical Specialty _____

Contact Info _____

Notes _____

Medical Specialist

Name _____ Medical Specialty _____

Contact Info _____

Notes _____

Medical Specialist

Name _____ Medical Specialty _____

Contact Info _____

Notes _____

Medical Specialist

Name _____ Medical Specialty _____

Contact Info _____

Notes _____

Medical Specialist

Name _____ Medical 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



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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

Gas

Provider Name

Account Number

Contact Info

Water/Sewage

Provider Name

Account Number

Contact Info

Internet/Cable

Provider Name

Account Number

Contact Info

Home Phone

Provider Name

Account Number

Contact Info

Cell Phone

Provider Name

Account Number

Contact Info

Other

Provider Name

Service Type

Account Number

Contact Info

Other

Provider Name

Service Type

Account Number

Contact Info

Digital Accounts

Computers/Mobile Devices

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

Notes

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