

Client's name \_\_\_\_\_

**Location of personal records and documents:**

Listing the location of personal records and documents will expedite the estate administration process and reduce the likelihood of an item being overlooked or improperly handled. If these items cannot be located, there may be additional expense and delay when your estate is administered.

<b>ITEM</b>	<b>LOCATION</b>
Original Last Will and Testament . . . . .	_____
Letter of Direction . . . . .	_____
Original Enduring Power of Attorney . . . . .	_____
Health Care Directive . . . . .	_____
Organ/tissue donation card . . . . .	_____
Pre-planned funeral contract . . . . .	_____
Instructions regarding pets . . . . .	_____
Credit cards . . . . .	_____
Debit cards . . . . .	_____
Insurance policies . . . . .	_____
Safe deposit box . . . . .	_____
Box # _____ . . . . .	Keys are kept _____
Previous years' income tax returns . . . . .	_____
Bank account records . . . . .	_____
Pension plans or annuities . . . . .	_____
Investment information . . . . .	_____
Real estate titles . . . . .	_____
Mortgage/loan information . . . . .	_____
Time share contracts . . . . .	_____

ITEM	LOCATION
Birth certificate . . . . .	_____
Passport/citizenship papers . . . . .	_____
Social insurance card . . . . .	_____
Marriage certificate(s) . . . . .	_____
Marriage contract . . . . .	_____
Cohabitation contract . . . . .	_____
Divorce decree/separation agreement	_____
Health insurance card . . . . .	_____
Driver's license . . . . .	_____
Vehicle registration . . . . .	_____
Incentive cards (i.e. Air Miles, etc.) .	_____
Medical/dental information . . . . .	_____
Social networking sites . . . . .	_____
Passwords held at . . . . .	_____
<b>Other</b>	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Concentra Trust: Your Estate Administration Experts**  
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