

Estate Planning Checklist



Please download this free checklist to ensure you have everything in order to better protect you and your loved ones. Perfect for that binder of yours.

LEGAL:

- Will** - Yours and your partner/spouse + where the actual physical document(s) is stored
- Power of Attorney** - Yours and your partner/spouse + actual physical document(s) is stored
- Health care directives** - Where the actual physical document(s) is stored

ASSETS:

- Bank accounts** - List all your bank accounts clearly with as much detail as possible
- Properties** - List all of them, how they are owned, mortgage or line of credit, insurance, strata or property management information, internet and cable provider
- Investment holdings** - RRSP, mutual funds, stocks, RESP and other investments. Please be sure to include where they are held and provide contact information
- Vehicles** - Ownership and Insurance
- Accounting and taxes** - List where you can find your previous annual taxes and accountant contact information
- Corporate Assets** - Provide any company information and ownership agreements
- Pension**
- Life Insurance** - Personal and work

DIGITAL ACCOUNTS:

Include account number, username and password for all items below

- | | |
|--|---|
| <input type="checkbox"/> Facebook _____ | <input type="checkbox"/> LinkedIn _____ |
| <input type="checkbox"/> Instagram _____ | <input type="checkbox"/> Twitter _____ |
| <input type="checkbox"/> Netflix _____ | <input type="checkbox"/> Other _____ |

HEALTH INFORMATION:

- | | |
|---|--|
| <input type="checkbox"/> Allergies _____ | <input type="checkbox"/> Prescription Drugs _____ |
| <input type="checkbox"/> Blood type _____ | <input type="checkbox"/> Organ Donor - <input type="checkbox"/> Y / <input type="checkbox"/> N |

TEAM:

Clearly list and provide contact information for the following people

- | | |
|---|---|
| <input type="checkbox"/> Executor _____ | <input type="checkbox"/> Lawyer _____ |
| <input type="checkbox"/> Accountant _____ | <input type="checkbox"/> Life Insurance contact _____ |

FUNERAL AND OTHER INFO:

- Instructions** - Instructions to the Executor
- Notes** - Notes regarding your funeral
- Videos** - Location of any videos that you want your loved ones to see

This checklist has been designed to help you collect the right information and store it physically. With ReadyWhen, all this information can be stored digitally and you can give access to your family, friends, Executors and Professionals so they can have access to vital information easily and securely.