

When death occurs, the task of the person looking after the affairs of the deceased is greatly simplified if a detailed file or document containing detailed personal information has been prepared. It is of utmost importance that the executor and the next of kin be given a copy or know exactly where the file is kept. Good communication is vital.

1. VITAL INFORMATION

- Full name
- Spouse birth name
- Name of father and mother
- Mother's birth name
- Date and place of birth
- Funeral officiant to be notified
- Funeral home choice
- Place of burial or disposition desired
- Photograph for newspapers, location

2. WILLS, POWER OF ATTORNEYS

- Name and telephone number of the Executor and next of kin
- Location of the originals (lawyer's office address, telephone)
- Location of copies (e.g.- first drawer of grey filing cabinet)
- Location of donor card

3. BANK ACCOUNTS, LOANS, DEBTS & OTHER LIABILITIES

- Bank account numbers - chequing and savings and which branch
- Location of bank statements
- Debit card numbers, PIN numbers
- Credit card numbers, location of cards and telephone numbers
- Detailed list of any loans, promissory notes, mortgages held
- Detailed list of any debts or liabilities

4. SAFETY DEPOSIT BOX

- Location of safety deposit box, key, record of content and the name(s) of those who have access.

5. PENSIONS

- OTPP – Ontario Teachers Pension Plan 1.800.668.0105 (toll free)
- CPP – Canada Pension Plan, Survivor Benefits 1.800.277.9914
- Any Pension Plan other than the above, telephone number
- OAS –Old Age Security, for service in English 1.800.277.9914 for service in French 1.800.277.9915

6. INSURANCE – LIFE, HEALTH, HOUSE, CARS, BOATS, TRAVEL

- List and location of all policies including policy numbers, Company & agent's address and telephone.
- RTO/ERO Health Plan – 416.962.9463 or 1.800.361.9888 (toll free)
- Johnson Inc – 905.764.4888 or 1.800.638.4735 (toll free)

7. INVESTMENTS & REAL ESTATE

- Securities information and where securities documents are kept
- Investment Account number, name of institution, broker's telephone
- RRSP, TFSA - Tax Free Savings Account number
- Real estate and how title is held

8. NUMBERS

- Social Security number and location
- Driver's Licence number and location
- Health Card number and location
- List of usernames and passwords for your computer

9. OTHER IMPORTANT DOCUMENTS

- Location of birth certificate
- Location of marriage certificate, separation or divorce
- Location of passport
- Location of Social Security Card
- Location of Cemetery deed/location
- Military service and location of discharge papers
- Location of latest Income Tax Report
- Location of Funeral arrangement contract

10. FINGERPRINTS AND DENTAL RECORDS

- Name, address, telephone number of your dentist
- Name, address, telephone number of your physician
- Location of fingerprints if applicable

Once it has been assembled, your PRE-DEATH PLANNING file should be kept up to date by reviewing it at least once a year.

N.B. You may also want to check other RTO/ERO Fact Sheets on related topics:

H-3 IMPORTANT DOCUMENTS, E-8 FUNERAL PLANNING, E-9 THE EXECUTOR'S CHECKLIST, A-10 JOINT ASSET PLANNING