



PERSONAL INFORMATION

Name: _____

Date of Birth: _____ Birth Place: _____

Father's Surname: _____ Birth Place: _____

Mother's Maiden Name: _____ Birth Place: _____

Social Insurance No. _____ Employee No. _____

PEOPLE TO NOTIFY

Name: _____ Relationship: _____

Address: _____

_____ Phone No. _____

Name: _____ Relationship: _____

Address: _____

_____ Phone No. _____

Name: _____ Relationship: _____

Address: _____

_____ Phone No. _____

Name: _____ Relationship: _____

Address: _____

_____ Phone No. _____

Name: _____ Relationship: _____

Address: _____

_____ Phone No. _____

This list should include executors, relatives, friends, societies, clubs, professional associations and unions.



MEMORANDUM

FUNERAL and BURIAL INSTRUCTIONS

Though I realize the following is not binding on my Executor (Estate Trustee), the following are my wishes:

Choice of funeral home or memorial society:

Location of burial plot:

Open or closed coffin:

Cremation or not:

Where ashes are to be buried:

Location of funeral:

Wording of obituary:

Hymns or songs to be sung:

Pall bearers:

Charitable donations to be sent:

ASSETS

Location of Will

Location of Safety Deposit Boxes

Bank Accounts

| <u>Bank</u> | <u>Branch</u> | <u>Account Number</u> |
|-------------|---------------|-----------------------|
|-------------|---------------|-----------------------|

Stocks and Bonds

| <u>Name</u> | <u>Amount</u> | <u>Location</u> |
|-------------|---------------|-----------------|
|-------------|---------------|-----------------|

Insurance Policies and Death Benefits

| <u>Company</u> | <u>Policy Number</u> | <u>Amount</u> | <u>Beneficiary</u> | <u>Location</u> |
|----------------|----------------------|---------------|--------------------|-----------------|
|----------------|----------------------|---------------|--------------------|-----------------|

MEMORANDUM

PERSONAL BELONGINGS

Though I realize the following is not binding upon my Executor (Estate Trustee), I would like the Executor, after consulting with the beneficiaries, to distribute the following personal belongings to the following persons:

PERSONAL ADVISORS

Lawyer: **Lawrence S. Pascoe**

Address: 39 Robertson Road, Suite 300, Ottawa, Ontario, K2H 8R2

lpascoe@thepascoedifference.com www.thepascoedifference.com

Phone No. (613) 828-2120, ext 117 Reason to Notify: to administer estate

Life Insurance Agent: _____

Address: _____

Phone No. _____ Reason to Notify: _____

Stock Broker: _____

Address: _____

Phone No. _____ Reason to Notify: _____

Accountant: _____

Address: _____

Phone No. _____ Reason to Notify: _____

Investment Councillor: _____

Address: _____

Phone No. _____ Reason to Notify: _____

Spiritual Advisor: _____

Address: _____

Phone No. _____ Reason to Notify: _____

Doctor: _____

Address: _____

Phone No. _____ Reason to Notify: _____

Employer Personnel Department: _____

Address: _____

Phone No. _____ Reason to Notify: _____

LOCATION OF DOCUMENTS

(A - accountant's office) (B - stock broker's office) (H - home) (L - lawyer's office) (O - office)
(S - safety deposit box) (W - Will manual)

Use one of the locations above to identify where the following documents may be found:

| | |
|-------------------------------------|-------|
| Will: | _____ |
| Income tax returns: | _____ |
| Marriage Certificate: | _____ |
| Birth Certificate: | _____ |
| Bank books: | _____ |
| Stocks: | _____ |
| Bonds: | _____ |
| Deeds to property: | _____ |
| Life insurance policies: | _____ |
| Mortgage, loan, creditor documents: | _____ |
| Funeral arrangements: | _____ |
| Automobile insurance policies: | _____ |
| Property insurance policies: | _____ |



MEMORANDUM
WHEN DEATH OCCURS

The following is a simple guide of what to do when death occurs.

Check the Will Manual for burial instructions, people to notify, location of documents.

Contact the following:

All Executors named in the Will;

Clergy if applicable;

If parts of the body are to be donated for medical or research purposes,
contact institutions involved.

If death occurs as a result of an accident contact a lawyer and police if not already notified (as soon as practical).

Cancel deliveries, service calls, subscriptions, appointments, etc., on behalf of the deceased.

Obtain death certificate - usually from the funeral home.

Arrange to publish death notice in newspaper.

Contact memorial society or funeral home. The deceased should have left specific instructions regarding mode of burial either in the Will or by memorandum.

Contact a lawyer with respect to administration of the estate. The information which would assist the lawyer at your first appoint includes: copy of the Will; List of Assets, Debts and Benefits; Insurance policies; Death Certificate; Birth Certificate; Marriage Certificate; Social Insurance Number. You do not need to wait to obtain documents before your first appointment.

Change mailing address.

