

# Estate Record File

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## 1. Personal Information

Name	Information	Document Location
Date of Birth		
Place of Birth		
Social Insurance Number		
Driver's License		
OHIP		
Passport		
Father's Name		
Mother's Name		

Siblings:

Principal Family Contact:

Name	Information	Document Location
Date of Birth		
Place of Birth		
Social Insurance Number		
Driver's License		
OHIP		
Passport		
Father's Name		
Mother's Name		

Siblings:

Principal Family contact:

## 2. Personal Advisors

Name	Contact Information
Executors	
Power of Attorney for Property and Personal Care	

Keith Taylor	
Financial	
Lawyer	

### 3. Doctors

Name	Contact Information

### 4. Important Documents

Document	Location - Original	Location - Copy
Wills		
Powers of Attorney		
Birth Certificates		
Citizenship		
Marriage Certificate		
Passports		
House deed		

### Safety Deposit Box

Location	Contents

### 5. Insurance

Type	Provider	Details	Payment Schedule
House and Property			

Vehicle			
Mortgage Fraud			
Supplementary Health and Dental			

## 6. Bank Accounts, Credit Cards

Bank	Branch	Account Type

## 7. Pension

Type	Details	Documents Location

## 8. Investments

Advisor Name	Type of Investments	Contact

9. Subscriptions, Memberships

Name	Yearly etc.	Paid By

10. Household bills

Name	Paid By

11. Funeral Arrangements

Provider	Contact Name