

Life Planning book headings

Executor information – name, instructions.

Financial – bank accounts, safety deposit, financial planner, automatic deductions, apartment storage locker and keys

Funeral services, cemetery plot etc.

Contact lists – who to call immediately – family, church, funeral home

Life Insurance and pensions – contact numbers

Obituary and philanthropy – charities to be mentioned in the obit.

Enduring power of attorney, living will, end of life health directives.

Wills – name of lawyer

Those who need to be contacted for change of name or closing of accounts – banks, investments, government (OAS, CPP), land titles, income tax, subscriptions, alumni, credit cards, driver's license, health card. What automatic deductions are there?

Special documents – birth and marriage certificates, passports, social insurance, divorce papers.

For the special documents, I bought sheets with small pockets (I think they are used for baseball trading cards) and I put the birth certificates, Social Insurance # etc. , safety deposit box key and so on in these, and we now keep all that in the binder so the children will be able just to look in one place. I keep the passports somewhere else but with a note as to where they are kept.

Family data