

Important Estate Information for My Executor(s)/Trustee(s)

Name of Estate:	
The Will is stored at:	
The funeral arrangements are with:	
The bank is:	Branch Location:
The safety deposit box is located:	

Key Contacts:

Lawyer

Name	Firm	Phone Number
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Accountant

Name	Firm	Phone Number
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Financial Advisor

Name	Firm	Phone Number
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Insurance Broker

Name	Firm	Phone Number
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Key Business Contact

Name	Firm	Phone Number
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Key Family Member

Name	Relationship	Phone Number
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Executor Liability Insurance - ERAssure:

Name	Customer Service Representative	1-855-636-3777
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Detailed Estate Information

Estate Information

Name	SIN
Address	Passport Number
Date of Birth	Employer

Executor Information

Name	Address	Phone Number
Name	Address	Phone Number
Name	Address	Phone Number

Power of Attorney Information

Name	Address	Phone Number	Personal Care
Name	Address	Phone Number	Property

Financial Institution Information

Name	Account Type	Account Holder(s)	Account Number
Name	Account Type	Account Holder(s)	Account Number
Name	Account Type	Account Holder(s)	Account Number

Insurance Information (Life)

Insurance Company	Agent	Policy Number	Beneficiary	Face Amount
Insurance Company	Agent	Policy Number	Beneficiary	Face Amount
Insurance Company	Agent	Policy Number	Beneficiary	Face Amount

Insurance Information (General)

Insurance Company	Broker	Policy Number
Insurance Company	Broker	Policy Number

Investment Information

Company	Broker	Account Number
Company	Broker	Account Number

Pension/Annuity Information

Company	Date of Deposit:	Amount of Deposit:
Company	Date of Deposit:	Amount of Deposit:

Lawyer Information

Name	Firm	Phone Number
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Accountant Information

Name	Firm	Phone Number
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Properties

Address/Location	Property Manager	Key Location	Mortgage Holder
Address/Location	Property Manager	Key Location	Mortgage Holder
Address/Location	Property Manager	Key Location	Mortgage Holder

Other Asset Information

Type	Address	Contact Person
Instructions		
Type	Address	Contact Person
Instructions		
Type	Address	Contact Person
Instructions		

Passwords

Banking	UserName	Password
Telephone	UserName	Password
Utilities	UserName	Password
Facebook	UserName	Password
Twitter	UserName	Password
LinkedIn	UserName	Password
Other (specify)	UserName	Password



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