

# My Life List

My Life List is designed to help you collect and review all of the key personal and financial information in your life. This information can be extremely helpful to your executor and loved ones if you were to pass away. It can also assist you and your financial advisor to build a more complete financial plan.



THE BIGGEST COMPLIMENT YOU CAN GIVE,  
IS TO LET YOUR FAMILY AND FRIENDS  
KNOW ABOUT MY SERVICES.

[WWW.KODAF.A.COM](http://WWW.KODAF.A.COM)

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## About Me

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_ Social Insurance Number: \_\_\_\_\_

Emergency Contact Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

## My Professionals

### Lawyer

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

### Insurance Agent

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

### Accountant

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

### Doctor/Healthcare

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

### Financial Advisor

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

## My legal documents

I have a will  Yes  No If yes, it is located: \_\_\_\_\_

### Person Who Prepared My Will

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

### My Executor

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

I have a Power of Attorney for Property  Yes  No

If yes, it is located: \_\_\_\_\_

### Person Who Prepared My Power of Attorney for Property

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

### My Power of Attorney for Property

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

I have a Power of Attorney for Personal Care  Yes  No

If yes, it is located: \_\_\_\_\_

### Person Who Prepared My Power of Attorney for Personal Care

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

### My Power of Attorney for Personal Care

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

I have a legal trust  Yes  No

If yes, it is located: \_\_\_\_\_

### Person Who Prepared My Trust

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

## My funeral arrangements

I have paid in advance for funeral arrangements  Yes  No

If yes, it is located: \_\_\_\_\_

## About Me

My current employer: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

I have group insurance  Yes  No

I am part of a pension plan  Yes  No

I am entitled to pension or other benefits from a past employer  Yes  No

If yes, details: \_\_\_\_\_

## My personal documents

I have a birth certificate  Yes  No If yes, it is located: \_\_\_\_\_

I have a marriage certificate  Yes  No If yes, it is located: \_\_\_\_\_

I have a divorce or separation agreement  Yes  No If yes, it is located: \_\_\_\_\_

List details of any other important personal documents: \_\_\_\_\_

\_\_\_\_\_

## My home

I rent my home  Yes  No

If yes, name and number of landlord: \_\_\_\_\_

Record details of:

Electricity

Phone

Gas

Cable

Water

Internet

This is located: \_\_\_\_\_

## My funeral arrangements

Record the following details:

- Card number
- Expiration date
- Copy of recent account statements
- Login and password for online account access

This is located: \_\_\_\_\_

**TIP** Store physical documents in a fireproof safe, a safety deposit box, or with your lawyer. Make sure at least two loved ones know how to access these places if they need to.

## My mortgage or loans

Record the following details:

- Company that provided the loan or mortgage
- Copy of the mortgage or loan agreement

This is located: \_\_\_\_\_

## My tax return

Record the following details:

- Copy of recent tax return
- Login and password for online CRA account access if applicable

This is located: \_\_\_\_\_

## My titles and deeds

Record the following details:

- Real estate
- Motor vehicles
- Boats

This is located: \_\_\_\_\_

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Record the following details:

- Real estate
- Motor vehicles
- Boats

This is located: \_\_\_\_\_

**TIP** Make digital copies of your paper documents using a scanner, a scanning app or a camera. This will help protect you from loss and make retrieving your documents easy.

## My investments

Record account statements and online login information for:

- Mutual funds
- GICs
- Stocks
- Bonds
- Savings bonds
- RRSPs
- TFSAs
- Non-registered investments
- Shares in a private company

This is located: \_\_\_\_\_

## My insurance

Record account statements and online login information for:

- Life insurance
- Disability insurance
- Critical illness insurance
- Home and auto insurance
- Health insurance
- Pet insurance

## My physical assets

Record account statements and online login information for:

- Paintings and sculptures
- Jewellery and watches
- Antiques and collectibles

**TIP** Walk through your home and storage places with a notebook or video camera to make note of all your belongings. This can help with estate planning and in the event of a fire or theft.

## My physical assets

Location of fireproof safe and how to access: \_\_\_\_\_

Location of safe deposit box and how to access: \_\_\_\_\_

Location of storage facility and how access: \_\_\_\_\_

## My email accounts

Record account statements and online login information for:

- Gmail
- Hotmail
- Yahoo! Mail
- Bonds
- AOL
- Other

This is located: \_\_\_\_\_

## My payments or e-commerce accounts

Record account statements and online login information for:

- PayPal
- Venmo
- Amazon
- Ebay

This is located: \_\_\_\_\_

## My social media accounts

Record account statements and online login information for:

- Facebook
- Instagram
- Twitter
- LinkedIn

This is located: \_\_\_\_\_

## My notes

Use this space to write down anything else that might be important for somebody to know if they were responsible for managing your affairs.

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