



Member's name _____

Location of personal records and documents:

Listing the location of personal records and documents will expedite the estate administration process and reduce the likelihood of an item being overlooked or improperly handled. If these items cannot be located, there may be additional expense and delay when your estate is administered.

ITEM LOCATION

- Original Last Will and Testament . . . _____
- Letter of Direction _____
- Original Enduring Power of Attorney . _____
- Health Care Directive _____
- Organ/tissue donation card _____
- Pre-planned funeral contract _____
- Instructions regarding pets _____
- Credit cards _____
- Debit cards _____
- Insurance policies _____
- Safe deposit box _____
- Box # _____ Keys are kept _____
- Previous years' income tax returns . . _____
- Bank account records _____
- Pension plans or annuities _____
- Investment information _____

Concentra Trust: Your Estate Administration Experts

Toll Free: **1.800.788.6311 Ext 1888** | Fax: 306.244.2042
 executorease@concentrafinancial.ca | www.concentrafinancial.ca

Real estate titles _____
 Mortgage/loan information _____
 Time share contracts _____

ITEM LOCATION

Birth certificate _____
 Passport/citizenship papers _____
 Social insurance card _____
 Marriage certificate(s) _____
 Marriage contract _____
 Cohabitation contract _____
 Divorce decree/separation agreement _____
 Health insurance card _____
 Driver's license _____
 Vehicle registration _____
 Incentive cards (i.e. Air Miles, etc.) . _____
 Medical/dental information _____
 Social Networking Sites _____
 Passwords Held at _____

Other

