

My Personal Affairs Record Keeper



A Handy Record of
Financial & Personal Information
for me & my Trusted People

The Record Keeper

A DIY Guide to Organizing Personal Information

In the event of an emergency, death or incapacity, it's critical that your loved ones or a trusted person acting with Power of Attorney have access to your important personal information.

My Financial Record Keeper helps you keep track of all your personal affairs, and provides the trusted people in your life with quick access to information should they need it.

It doesn't take long to fill this out, saving family and loved ones from what could be needless hours of searching for documents and contacts.

Once complete, keep in a safe, secure space and advise your loved ones, executor, or POA where they can find this single document.



We strongly recommend storing this document in a safe, secure location that only trusted individuals are made aware of.

Personal Information

BIRTH CERTIFICATE

COUNTRY OF BIRTH

Date of landing, Date of Canadian
citizenship

SOCIAL INSURANCE NUMBER

MILITARY SERVICE RECORDS

DRIVER'S LICENSE

PASSPORT/CITIZENSHIP PAPERS

DEATH CERTIFICATE

(for deceased spouse)

Estate Information

WILL

HEALTH CARE DIRECTIVE

POWER OF ATTORNEY

EXECUTOR TRUSTEE

PRE-ARRANGED FUNERAL /
INSURANCE

CEMETERY PLOT

LAWYER / LAW FIRM

Email, Social Media & Other Passwords

Important Documents

MARRIAGE LICENSE

Province/Country of Marriage

DIVORCE RECORDS

SEPARATION AGREEMENT

PRE/POST NUPTIAL AGREEMENTS

CUSTODY PAPERS

Financial Info & Assets

BANK ACCOUNT(S)

INSTITUTIONS, HOLDINGS,
CHEQUING/SAVINGS ETC.

INVESTMENTS

TFASs, RRSPs, RESPs, ETFs,
STOCKS, MUTUAL FUNDS, BONDS

DEBT

CREDIT CARDS / LINES OF CREDIT /
OTHER LOANS/LIENS

Financial Info & Assets

| | |
|---|-------|
| LIFE INSURANCE POLICY | _____ |
| CRITICAL ILLNESS INSURANCE | _____ |
| | _____ |
| PENSION(S)/BENEFITS | _____ |
| PREVIOUS YEAR'S TAX RETURNS | _____ |
| LOCATION OF PERSONAL ITEMS OR KEEPSAKES (Especially those identified in the will) | _____ |
| | _____ |
| | _____ |
| | _____ |

Financial Contacts

| | |
|-----------------------------|-------|
| FINANCIAL PLANNER & ADVISER | _____ |
| | _____ |
| ACCOUNTANT | _____ |
| LAWYER | _____ |
| LIFE INSURANCE AGENT | _____ |

Keys, Mailbox, Safety Deposit Box, etc.

| |
|-------|
| _____ |
| _____ |
| _____ |
| _____ |
| _____ |

Home & Other Properties

LIST OF ALL PROPERTIES

MORTGAGE OR RENTAL DOCUMENTS

UTILITY BILLS

LIST providers/account numbers for power, cable, phone, internet, water/sewer, etc.

HOMEOWNERS OR TENANTS INSURANCE

PROPERTY TAX BILL(S)

DEEDS/TITLES FOR PROPERTIES

Pets / Veterinarian

Automobile & Other Vehicles

REGISTRATION
(List all vehicles)

LOANS/FINANCING

INSURANCE

Health Information

NAME OF DOCTOR(S)

MEDICATION

MEDICARE NUMBER

MEDICAL RECORDS

HEALTH INSURANCE

DISABILITY INSURANCE



**Looking for useful, unbiased information?
Here are some helpful websites that might
come in handy:**

www.moneysmartmanitoba.ca

www.gov.mb.ca/seniors

www.gov.mb.ca/publictrustee/

www.aosupportservices.ca

My Record Keeper

| | |
|--|---|
| DATE OF CREATION/UPDATE | _____ |
| NEXT UPDATE IS SCHEDULED FOR (It is a best practice to update this information annually) | _____ _____ |
| TRUSTEES LIST: all trustees who will receive a copy of this document | _____ _____ _____ _____ _____ |

Notes

