
PERSONAL INFORMATION AND LIST OF DOCUMENTS

THE LIST BELOW HELPS IN ORGANIZE INFORMATION ON YOUR AFFAIRS IN CASE SOMETHING SHOULD HAPPEN. IT ALSO HELPS GIVE DIRECTION FOR ANY FUTURE PLANNING OF YOUR ESTATE PLAN.

Wills and Codicils

Last Time it Was Reviewed:
Written by:
Original Held by:
Where Can We Find Copies:
Executors:

Guardians for minors:
Will Date of Execution:
Codicil Date(s) of Execution:
Comments:

Continuing Power of Attorney for Property

Last Time it Was Reviewed:
Written by:
Original Held by:
Where Can We Find Copies:
Attorneys:
Alternate Attorneys:
Conditions::

Comments:

Power of Attorney for Personal Care

Last Time it Was Reviewed:
Written by:
Original Held by:
Where Can We Find Copies:
Attorneys:
Alternate Attorneys:
Conditions::

Comments:

Other Powers of Attorney (e.g. banking, trading, etc.)

Type of Attorney:
Date of Execution:
Original Held by:
Where Can We Find Copies:

Attorneys:
Alternate Attorneys:
Conditions::

Comments:

Type of Attorney:
Date of Execution:
Original Held by:
Where Can We Find Copies:

Attorneys:
Alternate Attorneys:
Conditions::

Comments:

Inter Vivos Family Trusts*

Name of Trust:
Date of Execution:
Original Held by:
Where Can We Find Copies:

Trustee(s):
Alternate Trustee(s):

Comments:

*an intervivos trust is one made while both trustee and beneficiary are alive

Asset Protection Trust

Name of Trust:
Date of Execution:
Original Held by:
Where Can We Find Copies:

Type (Self-Benefit, Alter Ego, Joint Spousal Trust or with Multiple Beneficiaries):

Trustee(s):
Alternate Trustee(s):

Comments:

Family Planning Documents

Marriage Contract or Prenuptial Agreement

Matrimonial Regime:

Where was the marriage celebrated?:

Date of Execution:

Prepared by:

Comments:

Divorce or Separation

Other party:

Type (divorce or separation):

Date of Order/Agreement:

Prepared by:

Comments:

Cohabitation Agreement

Partner:

Date of Execution:

Prepared by:

Comments:

Pensions and Foreign Assets

Employer Pension Plan

Name of Employer:

Details:

Employer Pension Plan

Name of Provider:

Details:

Assets In Other Jurisdictions

Type of Asset:

Jurisdiction:

Co-Owners/Account Holders:

Description:

Do you have a Will in this jurisdiction?

Do you have a Power of Attorney in this jurisdiction?

Comments:

Type of Asset:

Jurisdiction:

Co-Owners/Account Holders:

Description:

Do you have a Will in this jurisdiction?

Do you have a Power of Attorney in this jurisdiction?

Comments:

Type of Asset:

Jurisdiction:

Co-Owners/Account Holders:

Description:

Do you have a Will in this jurisdiction?

Do you have a Power of Attorney in this jurisdiction?

Comments:

Other

Beneficiaries

Do some beneficiaries live outside Canada or have Dual Citizenship?

If yes, list name and country:

Income Taxes

Year of last filing:

Corporate Documents

Name of Corporation:

Directors:

Shareholders:

Minute Book Location:

Comments:

List of Advisors

Lawyer

Name:

Contact:

Accountant

Name:

Contact:

Financial Planner

Name:

Contact:

Tax Specialist

Name:

Contact:

Banker

Name:

Contact:

Investment Advisor

Name:

Contact:

Insurance Broker

Name:

Contact:

Doctor

Name:

Contact:

Other (specify):

Asset and Tax Information

| Type of Asset | Location | Acquisition Date | Fair Market Value at Acquisition | Current Value |
|---------------|----------|------------------|----------------------------------|---------------|
| | | | | |

List of Insurance Contracts

Insurance Company:
 Policy Number:
 Owner:
 Beneficiary/Beneficiaries:
 Revocable or Irrevocable:
 Type (term or permanent/whole life/critical illness/disability)

Comments:

Insurance Company:
 Policy Number:
 Owner:
 Beneficiary/Beneficiaries:
 Revocable or Irrevocable:
 Type (term or permanent/whole life/critical illness/disability)

Comments:

Insurance Company:
 Policy Number:
 Owner:
 Beneficiary/Beneficiaries:
 Revocable or Irrevocable:
 Type (term or permanent/whole life/critical illness/disability)

Comments:

Insurance Company:
 Policy Number:
 Owner:
 Beneficiary/Beneficiaries:
 Revocable or Irrevocable:
 Type (term or permanent/whole life/critical illness/disability)

Comments:

Notes:

IMPORTANT POINTS TO CONSIDER

When you should consider amending your documents:

- If your marital status changes
- If a named executor or attorney dies or becomes unable or unsuitable to act due to age or ill health
- If there are births or deaths (especially of a beneficiary) in your family
- If a named executor or attorney or anyone else mentioned in your will changes his or her name
- If you sell or otherwise dispose of any property you have specifically bequeathed
- If your estate assets or their values change materially
- If you have included beneficiary designations or RRSPs, RIFs, pensions or life insurance policies in your will and you subsequently obtain additional plans or policies (which won't be covered by the designations made in the will)
- If you leave Ontario and take up residence in another province or country
- If you acquire assets in another province or country

Important information regarding marriage, divorce and separation:

- Marriage will automatically revoke the will
- Divorce does not revoke an existing will, but it does revoke gifts by will to the former spouse and the appointment of the former spouse as an Executor unless the will contains a declaration to the contrary
- Separation does not revoke a will or the gifts by will to a spouse

Amending or revoking your documents:

- You may revoke or amend a will or power of attorney at any time provided you have the requisite mental capacity
- Your powers of attorney are automatically revoked on your death but your property attorney can continue to act, and third parties may rely on the attorney's actions until the attorney or the third party knows of your death
- Certain legal formalities must be observed for amendments or revocations to be valid and you will likely require assistance from a lawyer

CONTACT US

Have questions about your estate plan?

We can help you navigate the process and advise you on ways to protect you and your loved ones and ensure a lasting legacy.

Contact us today, we would love to help!

Phone: 1.866.AIONLAW

Email: info@aionlaw.ca