

# Personal Information Inventory



ONTARIO  
SECURITIES  
COMMISSION



Your Personal Information Inventory is a confidential document created to help a trusted contact locate your personal and financial accounts and records in the event that you are unable to provide guidance.

Once completed, this document will contain sensitive information and should be stored in a safe and secure location. Do not store or share the completed document electronically, and avoid making copies. Tell a trusted contact, such as a family member or close friend how to access the document, and take a moment to discuss what you expect of them.

Remember to review your Personal Information Inventory periodically to ensure the information is up to date.

<b>Personal Information</b>	<b>2</b>
<b>Legal Documents</b>	<b>3</b>
<b>Insurance</b>	<b>4</b>
<b>Professional Advisors</b>	<b>5</b>
<b>Medical Professionals</b>	<b>6</b>
<b>Assets</b>	<b>7</b>
<b>Debts</b>	<b>10</b>
<b>Utilities &amp; Services</b>	<b>12</b>
<b>Digital Accounts</b>	<b>13</b>
<b>Notes</b>	<b>14</b>

Name

Last Updated

## Personal Information

### My Information

Full Name

Previous Name (if applicable)

Home Phone

Cell Phone

Address

### Birth Certificate

Birth Certificate Location

Location & Date of Birth

### Social Insurance Number

SIN Card Location

SIN Number

### Driver's Licence

Card Location

Licence Number

Expiration Date

### Health Card

Card Location

Card Number

Expiration Date

### Passport

Passport Location

Passport Number

Expiration Date

### Citizenship Certificate

Certificate Location

Certificate Number

Date of Citizenship

### Personal Tax Returns

Location of Documents

### Military Service Records

Location of Documents

Date of Service

Date of Discharge

# Legal Documents

## Will/Trust

Will/Trust Location

---

Legal Counsel Name

---

Legal Counsel Contact Info

---

## Power of Attorney – Property

Location of Documents

---

Attorney Name

---

Attorney Contact Info

---

## Death Certificate (for deceased spouse)

Certificate Location

---

Date of Death

---

## Pre/Post-nuptial Agreements

Location of Documents

---

## Custody/Adoption Records

Location of Documents

---

## Real Estate Deeds, Titles & Plot Lines

Location of Documents

---

## Power of Attorney – Personal Care

Location of Documents

---

Attorney Name

---

Attorney Contact Info

---

## Marriage Certificate

Certificate Location

---

Date of Event

---

## Divorce Agreement

Location of Documents

---

Date of Event

---

## Birth Certificates (for children)

Location of Documents

---

## Mortgage Closing Documents

Location of Documents

---

## Cemetery Deed/Funeral Arrangements

Location of Documents

---

# Insurance

## Personal Insurance (life/disability/long-term care)

Insurance Company

Policy Number

Policy Period

Contact Info

Location of Documents

## Home/Rental Insurance

Insurance Company

Policy Number

Policy Period

Contact Info

Location of Documents

## Mortgage Insurance

Insurance Company

Policy Number

Policy Period

Contact Info

Location of Documents

## Health Insurance

Insurance Company

Policy Number

Policy Period

Contact Info

Location of Documents

## Auto Insurance

Insurance Company

Policy Number

Policy Period

Contact Info

Location of Documents

## Other Insurance

Insurance Company

Insurance Type

Policy Number

Policy Period

Contact Info

Location of Documents

# Professional Advisors

## Executor

Name \_\_\_\_\_

Contact Info \_\_\_\_\_

Notes \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Financial Advisor

Name \_\_\_\_\_

Contact Info \_\_\_\_\_

Notes \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Accountant

Name \_\_\_\_\_

Contact Info \_\_\_\_\_

Notes \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Estate Planning Lawyer

Name \_\_\_\_\_

Contact Info \_\_\_\_\_

Notes \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Real Estate Lawyer

Name \_\_\_\_\_

Contact Info \_\_\_\_\_

Notes \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Other

Name \_\_\_\_\_

Contact Info \_\_\_\_\_

Notes \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Medical Professionals

### Primary Physician

Name

Contact Info

Notes

### Eye Care

Name

Contact Info

Notes

### Medical Specialist

Name

Medical Specialty

Contact Info

Notes

### Medical Specialist

Name

Medical Specialty

Contact Info

Notes

### Dental Care

Name

Contact Info

Notes

### Medical Specialist

Name

Medical Specialty

Contact Info

Notes

### Medical Specialist

Name

Medical Specialty

Contact Info

Notes

### Medical Specialist

Name

Medical Specialty

Contact Info

Notes

## Assets

### Chequing Account

Joint  Individual

Financial Institution

Account Number

Contact Info

### Savings Account

Joint  Individual

Financial Institution

Account Number

Contact Info

### TFSA

Financial Institution

Account Number

Contact Info

### RRSP/RRIF

Financial Institution

Account Number

Contact Info

### Chequing Account

Joint  Individual

Financial Institution

Account Number

Contact Info

### Savings Account

Joint  Individual

Financial Institution

Account Number

Contact Info

### TFSA

Financial Institution

Account Number

Contact Info

### RRSP/RRIF

Financial Institution

Account Number

Contact Info

# Assets (Continued)

## Spousal RRSP/RRIF

Beneficiary

---

Financial Institution

---

Account Number

---

Contact Info

---

## RESP

Beneficiary

---

Financial Institution

---

Account Number

---

Contact Info

---

## RDSP

Beneficiary

---

Financial Institution

---

Account Number

---

Contact Info

---

## Pension

Pension Provider

---

Client Number

---

Contact Info

---

## LIRA/LIF

Financial Institution

---

Account Number

---

Contact Info

---

## RESP

Beneficiary

---

Financial Institution

---

Account Number

---

Contact Info

---

## Non-Registered Investments Joint Individual

Financial Institution

---

Account Number

---

Contact Info

---

## Annuity Joint Individual

Financial Institution

---

Account Number

---

Contact Info

---



## Assets (Continued)

### Safe Deposit Box

Financial Institution

Box Number

Contact Info

Key Location

### Tangible Property (real estate, vehicles, etc.)

Type of Asset

Location

Notes

Notes

### Other

Type of Asset

Location

Notes

### Other

Type of Asset

Location

Notes

### Tangible Property (real estate, vehicles, etc.)

Type of Asset

Location

Notes

### Tangible Property (real estate, vehicles, etc.)

Type of Asset

Location

Notes

### Other

Type of Asset

Location

Notes

### Other

Type of Asset

Location

Notes

## Debts

### Credit Card

Lender Name

Account Number

Contact Info

### Credit Card

Lender Name

Account Number

Contact Info

### Line of Credit

Lender Name

Account Number

Contact Info

### Mortgage

Lender Name

Account Number

Contact Info

### Credit Card

Lender Name

Account Number

Contact Info

### Credit Card

Lender Name

Account Number

Contact Info

### Line of Credit

Lender Name

Account Number

Contact Info

### Mortgage

Lender Name

Account Number

Contact Info

# Debts (Continued)

## Reverse Mortgage

Lender Name

---

Account Number

---

Contact Info

---

## Vehicle Loan/Lease

Lender Name

---

Account Number

---

Contact Info

---

## Other

Lender Name

---

Account Number

---

Contact Info

---

## Other

Lender Name

---

Account Number

---

Contact Info

---

## Payday Loan

Lender Name

---

Account Number

---

Contact Info

---

## Vehicle Loan/Lease

Lender Name

---

Account Number

---

Contact Info

---

## Other

Lender Name

---

Account Number

---

Contact Info

---

## Other

Lender Name

---

Account Number

---

Contact Info

---

## Utilities & Services

### Power

Provider Name

Account Number

Contact Info

### Water/Sewage

Provider Name

Account Number

Contact Info

### Home Phone

Provider Name

Account Number

Contact Info

### Other

Provider Name

Service Type

Account Number

Contact Info

### Gas

Provider Name

Account Number

Contact Info

### Internet/Cable

Provider Name

Account Number

Contact Info

### Cell Phone

Provider Name

Account Number

Contact Info

### Other

Provider Name

Service Type

Account Number

Contact Info

# Digital Accounts

## Computers/Mobile Devices

Device Type	Notes
Device Type	Notes
Device Type	Notes
Device Type	Notes

## Email

Email Provider	Email Address
Email Provider	Email Address

## Media Subscriptions (news, movies, music, books, games, etc.)

Service Name & URL	Name/Email associated with the account
Service Name & URL	Name/Email associated with the account
Service Name & URL	Name/Email associated with the account
Service Name & URL	Name/Email associated with the account
Service Name & URL	Name/Email associated with the account

## Social Media

Service Name & URL	Username/Email associated with the account
Service Name & URL	Username/Email associated with the account
Service Name & URL	Username/Email associated with the account
Service Name & URL	Username/Email associated with the account

