

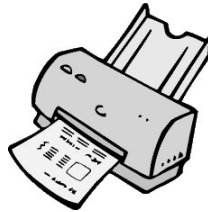


In our seminars we suggest participants pull together all the documents that might be necessary in the case of their incapacity or “untimely demise.” We suggest a red binder.

Be sure to let key people know to look for that red binder in the event that you are unable to make decisions for yourself.

In the past I had clients with all this information carefully stored on their computer – the only problem was that the contents were password protected – not very useful in this circumstance!

By all means keep it on your computer so documents can be readily updated but regularly print and put the most recent information in the binder – along with any computer/file passwords and the key to the safety deposit box or instructions on where the original documents are stored.



- ▶ Copy of the Will (indicate location of original)
- ▶ Copy of Powers of Attorney (POA) for Property and for Health (location of the original)
- ▶ Recent Net Worth Statement (all assets & liabilities, including where held, account numbers)
- ▶ Advisor Contact List (lawyer, accountant, financial advisor, banker, etc.)
- ▶ Copy of Insurance Policies (life, house, vehicles, recreation properties)
- ▶ List of friends and relatives to contact
- ▶ Fire Drill Directives (funeral and burial wishes)
- ▶ Recent Tax Return (shows SIN, sources of income, etc.)
- ▶ Vital Statistics for Registrar of Deaths (full name, date of birth, birthplace for self & parents, current address, occupation, marital status)
- ▶ Divorce/marriage documents, health care number, private health plans
- ▶ Social media user names, passwords (Facebook, Twitter, LinkedIn, Dropbox, etc.)
- ▶ Memberships – clubs, iTunes, Air Miles, COOP, etc.
- ▶ Personal Effects Memorandum (who gets personal items such as jewelry, paintings, etc.)