



Name: \_\_\_\_\_  
Phone Number: \_\_\_\_\_ Date of Last Revision: \_\_\_\_\_

**KEEPING TRACK: FINANCIAL ORGANIZER**

It can be useful to keep a current reference of your most important personal and financial information to stay up-to-date on paperwork or keep family in-the-know about your arrangements.

**PROFESSIONAL CONTACTS**

	Name	Company Name	Phone Number	Email
Employer				
Financial Advisor				
Life Insurance Agent				
Lawyer				
Accountant				
Family Doctor				
Family Dentist				
Veterinarian (If Pets Owned)				
Other Professionals				



**KEY FAMILY AND PERSONAL CONTACTS**

Name	Relationship	Address	Phone Number	Email

**Powers of Attorney**

Name	Phone Number	Email

**Will and Estate Information**

Location of Will	Date of Last Will	Executor	Trustee (If Applicable)

**Funeral and Cemetery Arrangements**

Pre-Arranged Contact: \_\_\_\_\_ Yes \_\_\_\_\_ No

**Safety Deposit Box**

Location of Box: \_\_\_\_\_  
Location of Key: \_\_\_\_\_



**Legal Documents/Certificates**

Document	Location
Birth Certificate	
Children's Birth Certificate	
Social Insurance Card	
Health Insurance Card (i.e. OHIP)	
Marriage or Cohabitation Agreements	
Income Tax Returns	
Other Legal Documents	

**INSURANCE**

**Life Insurance Policies**

Company	Policy Number	Coverage	Contact

**Extended Healthcare, Critical Care and Disability Policies, Employment Health Plans**

Company	Policy Number	Coverage	Contact



**Property, Auto and Casualty Insurance**

Company	Policy Number	Coverage	Contact

**INVESTMENTS AND INCOME**

**Primary Advisor Contact(s)**

Name	Company	Phone	Email

**Investment Accounts, GICs, Other Savings**

Registered Accounts	Account Number	Value	Location/Financial Institution
RRSP/RRIF			
IPP			
TFSA			
RESP			

Non-Registered	Account Number	Value	Location/Financial Institution



**Investment Accounts, GICs, Other Savings - Continued**

Bank Accounts	Account Number	Financial Institution	Contact/Location

**Other Investments (Real Estate, Collectibles, Art, Etc.)**

Type	Value	Location

**Other Income**

Type	Value or Monthly Income	Source/Institution
Annuities		
Pension		
Government Pension		
Mortgages/Rent		

**CREDIT AND LOANS**

Type	Account Number	Balance	Financial Institution/Contact
Mortgage(s)			
Loan(s)			
Line of credit			
Credit Cards			
Other/Personal			



**MEMBERSHIPS**

Type/Purpose	Store	Account Number	Contact/Location
Retail (ex: Costco)			
Drug Store			
Professional			
Gym/Club			
Library			

**AUTOMOBILES**

Make/Model/Year	Ownership/Lease	License Plate	Location/Contact

**REAL ESTATE AND RESIDENCE**

**Home**

Address: \_\_\_\_\_  
 Title held by: \_\_\_\_\_  
 Location of deed: \_\_\_\_\_  
 Lawyer/Contact: \_\_\_\_\_

**Other property**

Address: \_\_\_\_\_  
 Title held by: \_\_\_\_\_  
 Location of deed: \_\_\_\_\_  
 Lawyer/Property Manager Contact: \_\_\_\_\_

**Vacation property**

Address: \_\_\_\_\_  
 Title Held By: \_\_\_\_\_  
 Location of Deed: \_\_\_\_\_  
 Lawyer/Property Manager Contact: \_\_\_\_\_



**UTILITIES/SERVICES**

Type	Account	Company	Contact	Password/Code
Internet/Email				
Cell Phone				
Home Phone				
Cable				
Water				
Electricity				
Gas				
Alarm System				
Water Heater				
Other Services				
Parking Rental				
Children's School & Before/Aftercare				
Property Tax				
Magazine Subscriptions				