

**Will & Power of Attorney**

Name	
Address	
Date of Birth	

**Personal Information**

Name in Full (First, Middle, Last)				
(Also known as)				
Telephone	Business		Home	
Occupation				
Name of Employer/ Business Name				
Date of Birth				
Marital Status				
Date & Place of Marriage				
Details of any domestic contracts				
Name of Spouse				
Date of Birth of Spouse				
Full name(s) of Ex-Spouse(es)				

**Children**

Name, address, and date of birth	

**Full names & addresses of any other beneficiaries**

Name, address, and date of birth	

Details of any support obligations	
Details of any relevant personal situations, e.g. disabled or spendthrift spouse and/or children	
Residence for Income Tax Purposes	
Name of Accountant	
Name of Investment Advisor	
Name of Insurance Advisor	

## Assets

### Safety Deposit Boxes

Location		
Box Number		
Registered Name		
Location of Key		

### Real Estate (indicate principal residence)

Street Address or location	
Names on Title	
Current Market Value	
Mortgage or Line of Credit	
Other Property	
Names on Title	
Current Market Value	
Mortgage or Line of Credit	

**Life Insurance**

Policy No.		
Beneficiary		
Value of Benefit to Estate		
Issued by		

**Private Pension**

<b>Details</b>
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**Bank Accounts**

Name & Address of Bank		
Type of Account		
Ownership		
Approximate Value		

**Investments (Shares, Bonds, Debentures, GIC's) Approximate Value of Portfolio**

Description of Investments				
Account numbers				
Current value				
Physical location				

**Automobiles, Boats & Recreational Vehicles**

Description			
Value			
Ownership			

**Debts including Mortgages**

Creditor			
Principal			
Interest			
Maturity Date			