

PREPAREDNESS PLAN



PREPARED BY _____

Contents

1) Personal Information

- a) Copies of Important Identification
- b) Emergency Contact information and Family

2) Personal Advisors

- a) Business Cards

3) Doctors

- a) Prescription Lists

4) Important Documents

- a) Copies

5) Insurances

- a) Policies

6) Bank Accounts and Credit Cards

- a) Copies of Statements

7) Loans

- a) Copies of Statements

8) Pensions

- a) RRSP
- b) Work Pension Plans
- c) Spouse Beneficiary to Pensions

9) Income Tax

- a) Notice of Assessment

10) Investments

- a) Copies of Statements

11) Subscriptions and Memberships

12) Utilities and Bills

- a) Copies of Bills

13) Passwords

14) Keys and Lock Codes

17) Pet Information

- a) Vet Files

16) Funeral arrangements

- a) Final wishes

17) Accomplishments, Special dates, Career history

- a) Preparing obituary information

1. Personal Information of: _____
 (The Individual completing this form)

Name	Information	Document Location
Full Name		
Maiden/Birth name		
Date of Birth		
Place of Birth		
Social Insurance Number		
Driver's License		
Provincial Health Care #		
Passport		
Father's Name		
Father's place of birth		
Mother's Maiden Name		
Mother's place of birth		

Spouse's Information:

Name	Information	Document Location
Spouse's Full name		
Maiden/Birth name		
Date of Birth		
Place of Birth		
Date Deceased (if applicable)		
Death Certificate		
Burial Records		
Social Insurance Number		
Driver's License		
Provincial Health Care #		
Passport		
Spouse's Father's Name		
Father's place of birth		
Spouse's Mother Name		
Mother's place of Birth		

2. Personal Advisors

Name	Contact Information
Executor	
Power of Attorney or Enduring Power of Attorney	
Personal Directive	
Financial	
Lawyer	
Accountant	

3. Doctors

Name	Contact Information

Health Records

Allergies				
Medications				
Surgeries				

4. Important Documents

Document	Location - Original	Location - Copy
Wills		
Personal Directive		
Powers of Attorney or Enduring Powers of Attorney		
Birth Certificates		
Citizenship		
Marriage Certificate		
Passports		

7. Loans

Type	Provider	Details	Payment Schedule

8. Pensions

(List both personal and combined with spouse if applicable)

Personal:

Type	Details	Documents Location

Spouse's Pension or Beneficiary of other Policies

Type	Details	Documents Location

9. Income Tax

Prepared By	Documents Location

Spouse's (if applicable)

Prepared By	Documents Location

10. Investments

Advisor Name	Type of Investment	Name

14. Key and Lock Codes

	Keys	Code
House Keys		
RV, Motorhome, trailer		
Gun Safe		
Shed		
Filing cabinet		
Cabin (lake property, etc.)		

15. Pet Information

Name	DOB	Medical conditions

16. Funeral Arrangements, final wishes, and instructions

Do you have arrangements made with a Funeral Home?

Is it pre-paid? Family plots, cremation, formal burial, etc.

Provider	Contact Name

