

# Important Information Organizer

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*Proverbs 13:22a says, 'A good man leaves an inheritance to his children's children'.  
As Christians, we need to exercise wise stewardship over our possessions.*

*This includes:*

- *Wisely using and increasing the assets God has given us. (See Matthew 25:14-26)*
- *Showing love for our families and providing for their needs, both financial and for Christian nurture and instruction. (See I Timothy 5:8)*
- *Providing a plan and clear direction to follow up our stewardship responsibilities to our loved ones and God's work, beyond our earthly lifetime.*

Full Legal Name \_\_\_\_\_

Maiden Name, if applicable \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Telephone: Home \_\_\_\_\_ Business \_\_\_\_\_ Cell \_\_\_\_\_

Date of Birth \_\_\_\_\_ Place \_\_\_\_\_

Citizenship: Canadian  Other (which country) \_\_\_\_\_

Retired: Yes  No

Present Employer \_\_\_\_\_ Benefits provider \_\_\_\_\_

Employer Address \_\_\_\_\_ City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Marital Status: Single  Married  Widowed  Separated  Divorced  Common Law

Full Legal Name of Spouse (if applicable) \_\_\_\_\_

Maiden Name, if applicable \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Telephone: Home \_\_\_\_\_ Business \_\_\_\_\_ Cell \_\_\_\_\_

Date of Birth \_\_\_\_\_ Place \_\_\_\_\_

Citizenship: Canadian  Other (which country) \_\_\_\_\_

Retired: Yes  No

Present Employer \_\_\_\_\_ Benefits provider \_\_\_\_\_

Employer Address \_\_\_\_\_ City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Full Legal Name of Previous Spouse (if applicable) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

**Location of Documents**

It is vital that your Executor(s) know where to find your important documents, related to: latest signed Will (not a photocopy), all banks and accounts, investment accounts, retirement accounts, credit card(s), all loans, all insurance, benefit plan(s), pensions, business ownership contracts and all owned/leased property. Put this Organizer in a secure place that only your Executor(s) and/or Spouse can access.

Keep this information secured, private and up to date!

My documents are located as follows:

Latest original copy of Executed Will \_\_\_\_\_

(List all types of Accounts you have funds in; Savings, Chequing, Investments, RRSP/RRIF, etc.)

Bank \_\_\_\_\_ Branch \_\_\_\_\_

Type of accounts \_\_\_\_\_

Bank \_\_\_\_\_ Branch \_\_\_\_\_

Type of accounts \_\_\_\_\_

Bank \_\_\_\_\_ Branch \_\_\_\_\_

Type of accounts \_\_\_\_\_

Credit Cards (AMEX, MasterCard, Visa, etc.)

Credit Card \_\_\_\_\_ Institution \_\_\_\_\_

Credit Card \_\_\_\_\_ Institution \_\_\_\_\_

Credit Card \_\_\_\_\_ Institution \_\_\_\_\_

Safety Deposit Box

Bank \_\_\_\_\_ Branch \_\_\_\_\_

Key is located \_\_\_\_\_

Property(s) Owned \_\_\_\_\_ Property Insurance \_\_\_\_\_

\_\_\_\_\_ Property Insurance \_\_\_\_\_

\_\_\_\_\_ Property Insurance \_\_\_\_\_

\_\_\_\_\_ Property Insurance \_\_\_\_\_

Mortgage(s): Institution \_\_\_\_\_ Address \_\_\_\_\_

Institution \_\_\_\_\_ Address \_\_\_\_\_

Institution \_\_\_\_\_ Address \_\_\_\_\_

Institution \_\_\_\_\_ Address \_\_\_\_\_

Business(es) Owned \_\_\_\_\_ Contract location \_\_\_\_\_

\_\_\_\_\_ Contract location \_\_\_\_\_

\_\_\_\_\_ Contract location \_\_\_\_\_

\_\_\_\_\_ Contract location \_\_\_\_\_

Marriage Certificate \_\_\_\_\_ Life Insurance Policy(s) \_\_\_\_\_

Pension Plan(s) \_\_\_\_\_

My/our Birth Certificate (and/or Passport) \_\_\_\_\_

Children's Names and Birthdates

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Children's Birth Certificate location(s) \_\_\_\_\_

Income Tax Returns \_\_\_\_\_ Accountant \_\_\_\_\_

Funeral Arrangements with \_\_\_\_\_

Professionals used:

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

Financial Advisor \_\_\_\_\_ Contact Info \_\_\_\_\_

Other Professionals \_\_\_\_\_

Gains on Stocks and bonds, and funds in RRSPs and/or RRIFs are taxable if not offset by capital losses or Charitable Donations. Naming Springs Church as a beneficiary of your RRSPs and/or RRIFs can pass outside your Estate and provide offsetting tax credits for your Estate.