

My Heritage

(and other things my Executor(s) need know)

DO NOT KEEP IN YOUR SAFE DEPOSIT BOX

Your executor should know where to find this document

Date of this document:

If an electronic version, it is recommended the file name of this document include the document date:

File name:



50 Overlea Boulevard, Toronto ON M4H 1B6; 416-423-6386

www.HeritageES.ca



HERITAGE
ESTATE SERVICES

416-423-6386

Estate Planning

- Wills
- Documentation
- Advice

Executor Assistance

- *Alphacare*
- Estate Administration
- Income Taxes
- Accounting and bookkeeping
- Asset valuation
- Probate Assistance
- Estate Settlement

Member
*Canadian Institute of
Certified Executor Advisors*

www.HeritageES.ca

416-423-6386

ALPHACARE

Alphacare covers the first things an Executor must do following a death and it is only available from Heritage Estate Services. With *Alphacare* we prepare all the necessary forms and letters, electronic or otherwise to:

- Advise the Executor/Trustee of their responsibilities
- Communicate with the beneficiaries and notify them of their interest in the estate
- Advise the insurance company of the death
- Apply for all pensions, death benefits, life insurance or any other benefits that are payable to the estate
- Letters of Direction for all known memberships, associations, bank accounts, credit cards, etc.
- If there is any jointly owned property, advise the joint tenant
- If there are any life insurance policies, RRSP's or any other assets that name a beneficiary other than the estate, notify that beneficiary
- Advertise for creditors and claimants, if appropriate
- Prepare a list of tasks which remain for the Trustee to complete

Alphacare is available exclusively from Heritage Estate Services for a one-time fee of \$500.

Alphacare may be added to pre-arranged funerals at Heritage Funeral Centre and the price is guaranteed against future increase.

Your Trust is our Legacy

SAFEKEEPING

This document contains private information including Bank information and Personal Identification Numbers. It should be kept in a safe place, accessible only to your Executor.

If you save a copy of this document on your computer it should be password protected.

For clients who pre-arrange with Heritage Funeral Centre and include *Alphacare* in their contract, we offer complimentary safekeeping of *My Heritage*. An electronic or paper copy of *My Heritage* may be kept in our fire safe. It will be released back to you on request. Otherwise it will only be released to your Executor after a Form 16 - Medical Certificate of Death has been issued.

NOTES

Often your Executor is a close family member dealing with a stressful situation, usually unexpectedly.

Completion of this document will provide your Executor with most of their information needs, greatly reducing this burden.

Heritage Estate Services and their team of Certified Executor Advisors can further reduce the stress on your Executor – ask us how.

INSTRUCTIONS

You can use the booklet or the electronic version of *My Heritage*. If the electronic version is used, save the finished file to a USB key (or other storage media) for safekeeping.

Spouses should each prepare *My Heritage*. It is important to have accurate family information. It will be very helpful if your Trustee/Executor knows which assets (and liabilities) are held jointly and which are not.

Add as much information as possible. It can only help your Executor.

Remember this document must be kept in a safe place, accessible to your Executor.

Don't – keep in your safe deposit box

Do – seal in an envelope so you know if the document is accessed without your permission.

Do – update this document as things change; at a minimum annually.

My Heritage

Name:

A.K.A.:

Address:

City:

Province:

Postal:

Email Address 1:

Phone:

Email Address 2:

Cell:

Date of Birth:

Place of Birth:

Citizenship:

Occupation:

Industry:

Marital Status:

Additional notes:

My Lineage

My Spouse is:

Spouse Date of Birth:

Spouse Place of Birth:

My Children:

Name:

Date of Birth

I have Children with special needs:

Notes:

My Parents

My Father's name:

Place of Birth:

My mother's name:

Maiden surname:

Place of Birth:

My Call List

Use this area so that important friends, family and associates may be notified personally.

Name	Relationship	Phone
------	--------------	-------

My Executor (Trustee)

The Trustee(s) named in my will is(are):

Name: Contact Information:

Alternate Trustees names and contact information (if any):

My Pets

Many people have pets. If you have made special arrangements for the care of your pet(s) they should be written down.

Are any pets named in my will: Yes No

Name and contact information for my Veterinarian is:

Other important information for my Pets:

My Estate

Important Information

My S.I.N:

My Advisors are: Name: Address: Phone:

Lawyer:

Accountant:

Financial Advisor:

Executor Advisor:

Other:

People who have keys to my home:

My mail is picked up; Yes: No:

Pick up location:

The mail key is located:

Other important information:

My Estate (cont.)

Location of important documents:

Safe Deposit Box:

Key for safety deposit box:

Safe:

Safe combination:

Will:

Passport:

Birth Certificate:

Marriage Certificate:

Divorce Certificate:

Automobile Ownership:

Automobile Insurance policy:

Home and Property Insurance policy:

Income Tax Returns:

Life Insurance Policies:

Other documents:

My Finances

I bank at:

I have RRSP and/or RRIF accounts: Yes: No:

Located at:

Do RRSP/RRIF's have designated beneficiaries: Yes No

have a private pension: Yes: No:

Details of Private Pension Plan:

I may have assets with other financial institutions as follows:

My Finances (cont.)

I have important other assets:

Many people have important other assets. These assets including real estate should be listed to help your Executor. If the list is long or complicated it is probably best to record them on an attachment to this document. Include the cost of the asset.

I have attached a detailed list of assets: Yes: No:

If No list; Other Assets and costs are:

My Finances (cont.)

I may owe money:

I have a mortgage: Yes No:

Owing to:

Mortgage schedule is located:

Credit card name	Number	Comments
------------------	--------	----------

I have a line of credit – details are:

I have a car loan/lease owing to:

Loan schedule is located:

I have other notes payable – details are:

I have other debts – details are:

My Estate (Other Information)

Passwords for:

Home Alarm: _____

Computer: _____

Tablet: _____

Laptop: _____

Cell phone: _____

Other password information:

It will be a good idea for your Executor to close all online accounts. Record as many user names and passwords as possible. Examples may be:

<u>Site</u>	<u>Web address</u>	<u>Username</u>	<u>Password</u>
Social networking	www.facebook.com	_____	_____
Social networking	www.linkedin.com	_____	_____
Social networking	www.twitter.com	_____	_____
Banking	www.paypal.com	_____	_____
Banking	_____	_____	_____
Banking	_____	_____	_____
ecommerce	www.amazon.com	_____	_____
Ecommerce	www.ebay.com	_____	_____
Ecommerce	_____	_____	_____
Rewards	www.airmiles.com	_____	_____
Rewards	www.aeroplan.ca	_____	_____
Rewards	_____	_____	_____
Gas cards	_____	_____	_____
Professional Groups	_____	_____	_____
Clubs	_____	_____	_____
Other	_____	_____	_____

My Estate (Other Information)

Passwords for:

<u>Site</u>	<u>Webaddress</u>	<u>Username</u>	<u>Password</u>
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____

Notes:

Other Notifications

Doctor(s)/etc.	Name	Address	Phone
----------------	------	---------	-------

Doctor

Specialist

Dentist

Social Assistance:

Cable/Satellite:

Home phone:

Cell:

Phone:

Employer:

Landlord:

Housekeeper:

Other:

Notes:

My Wishes

Yes: ___ my funeral has been pre-arranged with:

My Funeral has been pre-paid: Yes ___ No ___

My funeral wishes are documented in the pre-arrangement

No ___ my funeral has not been pre-arranged

My funeral wishes are:

My Notes:

Record any other notes pertinent to your Estate.

Notes:

My Notes:

My Estate

PLEASE REMEMBER:

Don't – keep in your safe deposit box

Do – seal in an envelope so you know if the document is accessed without your permission.

Do – update this document as things change; at a minimum annually.



50 Overlea Boulevard, Toronto ON M4H 1B6; 416-423-6386

www.HeritageES.ca