

# ESTATE PLANNING REVIEW: CHECKLIST OF DOCUMENTS

This checklist is a guide for gathering the documents needed for an estate plan. Gather the information listed so it can be looked at all together. The list may not be exhaustive for everyone, but should cover most areas.

## Property Documents

- Ownership Documents
- Mortgage Statements
- Property Taxes
- Insurance

- Other:
- Other:
- Other:
- Other:

## Bank Accounts and Investments

- Chequing Accounts
- Savings Accounts
- RRSP/RIF Accounts
- Investments

- Vehicles
- Loans
- Credit Cards
- Other:

## Insurance Documents

- Life Insurance
- Critical Illness/Disability
- Other:

## Business Documents

- Shares
- Accounts
- Loans
- Other:

## Personal Documents

- Marriage Certificate
- Separation/Divorce Documents
- Other:

**Year:**

