



Wealth Management Dominion Securities

Compliments of:
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FAMILY INVENTORY

DATE PREPARED: _____

ABOUT YOU

NAME: _____ DATE OF BIRTH: _____
SPOUSE'S NAME: _____ DATE OF BIRTH: _____
DATE OF MARRIAGE: _____

EMERGENCY CONTACT # 1 NAME: _____ PHONE NUMBER: _____
EMERGENCY CONTACT # 2 NAME: _____ PHONE NUMBER: _____

ABOUT YOUR FAMILY

CHILDREN'S NAME:	SPOUSE:	ADDRESS:	PHONE NUMBER:

PROFESSIONAL ADVISORS

NAME:	DESCRIPTION:	FIRM:	PHONE NUMBER:
	Accountant		
	Lawyer		
	Banker		
	Investment Advisor		
	Other		

LOCATION OF IMPORTANT DOCUMENTS

BIRTH CERTIFICATE: _____ SPOUSE'S BIRTH CERTIFICATE: _____
MARRIAGE LICENSE: _____ SAFETY DEPOSIT: _____
CITIZENSHIP & PASSPORT: _____ SAFETY DEPOSIT BOX KEY: _____
PHYSICIAN'S NAME: _____ PHYSICIAN'S OFFICE: _____

POWER OF ATTORNEY LOCATION: _____ TYPE: _____
POWERS GIVEN TO: _____ PHONE: _____

SPOUSE'S POA LOCATION: _____ TYPE: _____
POWERS GIVEN TO: _____ PHONE: _____

WILL LOCATION: _____ DATE OF LAST WILL/CODICIL: _____
PERSONAL DIRECTIVE LOCATION: _____
EXECUTOR(S) APPOINTED: _____

SPOUSE'S WILL LOCATION: _____ DATE OF LAST WILL/CODICIL: _____
PERSONAL DIRECTIVE LOCATION: _____
EXECUTOR(S) APPOINTED: _____

(For more information about your passport please visit: www.passportcanada.gc.ca or call 1-800-567-6868)

CREDIT INFORMATION (Mortgage, Visa, Credit Line, etc.)

ISSUER:	TYPE:	ADDRESS:	PHONE NUMBER:	LIFE INSURED?
				Y or N
				Y or N
				Y or N
				Y or N
				Y or N
				Y or N
				Y or N

REAL ESTATE

PRINCIPAL RESIDENCE ADDRESS: _____ OWNERSHIP: Single or Joint
 OTHER PROPERTY ADDRESS: _____ Single or Joint
 TIMESHARE/FRACTIONAL OWNERSHIP: _____ CONTACT INFO: _____

INSURANCE (Including property, automobile, life, disability, critical illness, extended care, etc.)

ISSUER:	TYPE:	FACE VALUE:	CONTACT INFORMATION:

PENSION PLANS

COMPANY NAME: _____ COMPANY CONTACT: _____
 COMPANY NAME: _____ COMPANY CONTACT: _____

CPP AND OAS CONTACT INFO:

Mailing Address: *Service Canada
 PO Box 2710, Stn Main
 Edmonton, AB
 T5J 2G4* Telephone: 1-800-277-9914
 Website: <http://www.hrsdc.gc.ca/eng/oas-cpp/index.shtml>

PRE-PLANNED FUNERAL:

FUNERAL HOME: _____ CONTACT NAME: _____ PHONE: _____

Contact us for your complimentary copy of RBC Dominion Securities publication of "Settling an Estate" or visit our website at www.dennischinner.com and find this and other publications under the brochures tab.

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