OMERS

Location of valuable papers and assets

Use this form to list all of your important documents so they can be found quickly when needed.

On this side of the form, complete all the applicable locations where you keep your important documents. On the other side, circle the letter (A,B,C,D, E, or F) that corresponds to the locations you list below.

Give a copy of this list to your spouse, the executor of your will, or anyone else you want to have access to your important documents. You should also keep a copy for yourself.

Providing OMERS with your personal information is considered consent for its use and disclosure for the purposes set out in our Privacy Statement, as amended from time to time. You can find out more about our collection, use, disclosure and retention of personal information by reviewing our Privacy Statement at www.omers.com.

If you have questions about privacy at OMERS, please call OMERS Member Services at 1-800-387-0813.

A. Residence

Apt/Unit	Address	City	Province	Postal Code
Location of documents in your residence				

B. Safe deposit box

Bank name				Box number
Phone	Address	City	Province	Postal Code

C. Current or former employer

Employer name			Contact person	
Phone	Address	City	Province	Postal Code

D. Lawyer

Firm name			Lawyer's name	
Phone	Address	City	Province	Postal Code

E. Accountant

Firm name			Accountant's name	
Phone	Address	City	Province	Postal Code

F. Financial advisor

Name/Firm		Phone	
Address	City	Province	Postal Code

OMERS

A. Residence
B. Safe deposit box
C. Current or former employer
D. Lawyer
E. Accountant
F. Financial advisor

Wills

My will (original)	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Spouse's will (original)	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Copies of wills	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Burial instructions	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
List of special bequests	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F

Insurance

Group life insurance	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Individual life insurance	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Other death benefits	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Property and casualty insurance	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Health insurance policy	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Homeowner's insurance policy	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Car insurance policies	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Auto ownership records	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F

Financial

Chequing and savings accounts	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Cheque books	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Savings passbook	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Bank statements, cancelled cheques						
List of credit cards	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Certificates of deposit	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Record of investment securities	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Brokerage account records	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Stock certificates	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Mutual fund shares	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Bonds	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
OMERS pension	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
RRSPs	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Canada Pension Plan	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Other pension	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F

Housing

Titles and deeds to real estate and land	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Rental property records	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Notes and other loan agreements, including mortgages	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Rental/lease agreement	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
List (and proof) of valuable possessions	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F

Personal

Birth certificates	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Passports	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Citizenship papers	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Adoption papers	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Marriage certificate	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Children's birth certificates	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Children's adoption papers	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Divorce/separation records	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
Names and addresses of relatives/ friends	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F

Other

_____	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
_____	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
_____	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
_____	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
_____	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
_____	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
_____	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
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_____	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
_____	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
_____	☐ A	☐ B	☐ C	☐ D	☐ E	☐ F