

Location of valuable papers and assets

This list is designed to help you and your family keep track 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 of the form, 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.

A Residence

Street number	Street name	Apartment number
City		Province
Postal code		
Location of documents in your residence		

B Safe deposit box

Bank name		Box number
Phone number	Street number	Street name
City		Province
Postal code		

C Current or former employer

Employer name		
Contact person		Phone number
Extension		
Street number	Street name	
City		Province
Postal code		

D Lawyer

Firm name		
Lawyer's name		Phone number
Extension		
Street number	Street name	
City		Province
Postal code		

E Accountant

Firm name		
Accountant's name		Phone number
Extension		
Street number	Street name	
City		Province
Postal code		

F Financial advisor

Name/Firm		Phone number
Street number	Street name	
City		Province
Postal code		

