

You and Your Estate: Asset and Financial Assessment

Planning for the future is crucial, and we understand how important it is to ensure financial security for your loved ones. This estate planning toolkit is designed to help you start thinking about your future plans. We encourage you to consider how you want your estate to be managed, and your assets distributed.

When creating your estate plan, your legal and financial advisors will have many questions. This toolkit is intended to help you reflect on those questions and prepare accordingly.

We have provided this planning guide for your convenience. Please take your time to review each section. You will likely find that much of the information is already familiar or easily accessible. Keep in mind that this toolkit is not a legal will; rather, it serves as a way for you to organize and account for everything you have accumulated over your lifetime. Be sure to share this guide with your legal advisors and your family.

YOU AND YOUR FAMILY

YOUR FULL LEGAL NAME

DATE OF BIRTH

HOME ADDRESS

CITY, PROVINCE, POSTAL CODE

PRIMARY CONTACT NUMBER

SECONDARY CONTACT NUMBER

PERSONAL EMAIL ADDRESS

EMPLOYER

JOB TITLE

WORK CONTACT NUMBER

WORK EMAIL ADDRESS

MALE FEMALE

MARRIED SINGLE DIVORCED

WIDOWED LEGALLY SEPARATED

GENDER (PLEASE SELECT ONE)

PRESENT MARITAL STATUS (PLEASE SELECT ONE)

CHECK WHICH DOCUMENTS YOU CURRENTLY HAVE:

Will Living Will Trust Living Trust

Durable Power of Attorney (Health) Durable Power of Attorney (Finances)

Other (Please Specify): _____

YOUR SPOUSE'S INFORMATION

SPOUSE'S FULL LEGAL NAME

DATE OF BIRTH

HOME ADDRESS

CITY, PROVINCE, POSTAL CODE

PRIMARY CONTACT NUMBER

SECONDARY CONTACT NUMBER

PERSONAL EMAIL ADDRESS

EMPLOYER

JOB TITLE

WORK CONTACT NUMBER

WORK EMAIL ADDRESS

MALE FEMALE

MARRIED SINGLE DIVORCED
 WIDOWED LEGALLY SEPARATED

GENDER (PLEASE SELECT ONE)

PRESENT MARITAL STATUS (PLEASE SELECT ONE)

CHECK WHICH DOCUMENTS YOUR SPOUSE CURRENTLY HAS:

Will Living Will Trust Living Trust

Durable Power of Attorney (Health) Durable Power of Attorney (Finances)

Other (Please Specify): _____

Do you or your spouse have a prenuptial agreement that identifies and disposes of properties separately?

(If yes, be sure to provide a copy of the documentation to your attorney). Yes No

YOUR CHILDREN'S INFORMATION

CHILD'S FULL
LEGAL NAME

DATE OF BIRTH

HOME ADDRESS

CITY, PROVINCE, POSTAL CODE

PRIMARY CONTACT NUMBER

SOCIAL INSURANCE NUMBER (SIN)

MALE FEMALE

MARRIED SINGLE DEPENDENT
 NEEDS SPECIAL CARE

GENDER

PRESENT MARITAL STATUS

ORIGIN OF CHILD

PRESENT MARRIAGE PRIOR MARRIAGE OR RELATIONSHIP ADOPTED DECEASED

ADDITIONAL CHILD'S INFORMATION

CHILD'S FULL
LEGAL NAME

DATE OF BIRTH

HOME ADDRESS

CITY, PROVINCE, POSTAL CODE

PRIMARY CONTACT NUMBER

SOCIAL INSURANCE NUMBER (SIN)

MALE FEMALE

MARRIED SINGLE DEPENDENT
 NEEDS SPECIAL CARE

GENDER

PRESENT MARITAL STATUS

ORIGIN OF CHILD

PRESENT MARRIAGE PRIOR MARRIAGE OR RELATIONSHIP ADOPTED DECEASED

You and Your Executor

An executor is the person legally designated to manage your estate and see your intentions through. Your executor carries out how you intend your estate to be distributed, so you should select a trusted individual who understands your circumstances and intentions fully. An executor tends to complete eight separate processes to ensure the proper distribution and transfer of your property and assets to the designated individuals/or parties:

- Submit your will to the probate court
- Locate your heirs
- Determine your estate assets and values
- Pay bills and the estate attorney
- Make debt payments
- Resolve any estate controversies
- File your income and estate tax returns
- Distribute your assets to heirs

EXECUTOR'S LEGAL NAME

HOME ADDRESS

CITY, PROVINCE, POSTAL CODE

PRIMARY CONTACT NUMBER

SECONDARY CONTACT NUMBER

EMAIL ADDRESS

RELATIONSHIP, IF NOT SPOUSE

Your Power of Attorney – Medical

A Power of Attorney for Personal Care is a written document in which you give someone the power to make decisions about your personal care should you become unable to make these decisions yourself. Personal care can include your health care, medical treatment, diet, housing, clothing, hygiene, and safety. Although the person you give this power to is called your “attorney,” it does not mean that they are your lawyer. Most often, your attorney is your spouse, a relative, or a close friend.

FULL LEGAL NAME

HOME ADDRESS

CITY, PROVINCE, POSTAL CODE

PRIMARY CONTACT NUMBER

SECONDARY CONTACT NUMBER

EMAIL ADDRESS

RELATIONSHIP, IF NOT SPOUSE

Your Power of Attorney - Finance

A Power of Attorney for Finance is a written document in which you give someone the power to make decisions about your property and finances if you become unable to make these decisions yourself. For example, your Attorney for Property could be responsible for taking care of your banking matters, managing your investments, running your business, buying, and selling real estate on your behalf, or paying your monthly bills. The only thing that you could not appoint an attorney to do is to write your Will. Although the person you give this power to is called your “attorney,” it does not mean that they are your lawyer. Most often, your attorney is your spouse, a relative, or a close friend.

FULL LEGAL NAME

HOME ADDRESS

CITY, PROVINCE, POSTAL CODE

PRIMARY CONTACT NUMBER

SECONDARY CONTACT
NUMBER

EMAIL ADDRESS

RELATIONSHIP, IF NOT SPOUSE

YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT

REAL ESTATE/PROPERTIES	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
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MAIN RESIDENCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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ADDRESS	APPROXIMATE VALUE
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REAL ESTATE/PROPERTIES	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
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SECONDARY RESIDENCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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ADDRESS	APPROXIMATE VALUE
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REAL ESTATE/PROPERTIES	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
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VACATION HOME		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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ADDRESS	APPROXIMATE VALUE
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If possible, attach any statements or additional documents to support these estimates. If you need more space, please print additional copies of this page.

YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT

INVESTMENTS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
BONDS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN / ACCOUNT NUMBER APPROXIMATE VALUE

INVESTMENTS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
STOCKS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN / ACCOUNT NUMBER APPROXIMATE VALUE

INVESTMENTS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
ADDITIONAL ACCOUNT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN / ACCOUNT NUMBER APPROXIMATE VALUE

If possible, attach any statements or additional documents to support these estimates. If you need more space, please print additional copies of this page.

YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
HOUSEHOLD FURNITURE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DESCRIPTION APPROXIMATE VALUE

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
TOOLS/EQUIPMENT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DESCRIPTION APPROXIMATE VALUE

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
ANTIQUES/COLLECTIONS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DESCRIPTION APPROXIMATE VALUE

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
JEWELRY		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DESCRIPTION APPROXIMATE VALUE

YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
AUTOMOBILES/VEHICLES		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DESCRIPTION APPROXIMATE VALUE

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
BUSINESS INTERESTS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DESCRIPTION APPROXIMATE VALUE

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
PERSONAL LIFE INSURANCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN & POLICY NUMBER APPROXIMATE VALUE

VALUABLE ASSETS	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
EMPLOYER LIFE INSURANCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CUSTODIAN & POLICY NUMBER APPROXIMATE VALUE

YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT

LIABILITIES	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
PRIMARY MORTGAGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

HOLDER & ACCOUNT NUMBER APPROXIMATE VALUE

LIABILITIES	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
SECOND MORTGAGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

HOLDER & ACCOUNT NUMBER APPROXIMATE VALUE

LIABILITIES	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
VACATION MORTGAGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

HOLDER & ACCOUNT NUMBER APPROXIMATE VALUE

LIABILITIES	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
AUTOMOBILE/VEHICLE DEBTS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

HOLDER & ACCOUNT NUMBER APPROXIMATE VALUE

YOU AND YOUR ESTATE: AN ASSET AND FINANCIAL ASSESSMENT

LIABILITIES	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
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CREDIT CARD		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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HOLDER & ACCOUNT NUMBER	APPROXIMATE VALUE			
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LIABILITIES	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
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ADDITIONAL CREDIT CARD		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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HOLDER & ACCOUNT NUMBER	APPROXIMATE VALUE			
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LIABILITIES	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
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INSTALLMENT CONTRACTS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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HOLDER & ACCOUNT NUMBER	APPROXIMATE VALUE			
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LIABILITIES	CHECK IF:	JOINT PROPERTY	YOUR PROPERTY	SPOUSES PROPERTY
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LOANS ON LIFE INSURANCE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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CUSTODIAN & POLICY NUMBER	APPROXIMATE VALUE			
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Leaving Your Legacy

As you begin planning your legacy, we hope you will consider supporting work that creates meaningful change. Lasting impact takes time, and it is important to invest in efforts that make a difference for generations to come. Continued growth and success will require generous support from those who believe in this mission.

By making a Planned and Legacy (PLG) gift, you help ensure that impactful initiatives continue to improve the quality of life for communities worldwide.

To determine the best way to fulfill your charitable intentions, we recommend discussing your plans with your attorney or financial advisor. When you are ready to develop a plan, our team is available to work with you, in confidence, to help you explore and achieve your personal, financial, and charitable goals.

You have an opportunity to make a difference.

DISCLOSURE ON ATTORNEYS AND FINANCIAL ADVISORS

Thank you for taking the time to complete this estate and gift planning workbook. Every person's estate plan is unique to them and their family. Our Planned and Legacy Giving (PLG) team is here to assist you in planning for the future. However, we cannot offer specific legal or financial advice regarding your personal situation. Your legal and financial advisors are best suited to help you develop your estate plan and should be consulted independently. Collaborating with your attorney and financial advisor will help you create a personalized estate plan that fulfills your intentions and wishes.