

# FAMILY FINANCIAL ORGANIZER

## CONFIDENTIAL

### PERSONAL INFORMATION

You

Spouse/Partner

First Name

Last Name

Employer

Position

Key Work Contact

Business Partner(s)

Office Address

Office eMail Address

Office Telephone Number

Health Care Number

Medical Conditions

Medications

Pharmacy Location

### FAMILY MEMBERS

First Name

Last Name

Relationship to You

Phone Number

eMail Address

### FAMILY MEMBERS

First Name

Last Name

Relationship to You

Phone Number

eMail Address

## FAMILY & FINANCIAL INFORMATION

### EXECUTORS

	Executor	Co-Executor
First Name		
Last Name		
eMail Address		
Telephone Number		
Cell Phone Number		

### FAMILY TRUST

	Trustee	Co-Trustee
First Name		
Last Name		
eMail Address		
Telephone Number		
Cell Phone Number		

### PERSONAL PAPERS

	Document Location	Other Info/Who to Contact
My Will (Original)		
My Will (Copies)		
Spouse's Will		
Trust Agreements		
Power of Attorney		
Living Will/Medical POA		
Birth Certificate		
Passport		
Social Insurance Card		
Marriage Certificate		
Divorce/Seperation Papers		
Adoption Papers		
Family Death Certificates		
Tax Returns & Assessments		
Employment Records		

### PROPERTY PAPERS

Property Deeds		
Cottage Deeds		
Rental Property		
Vehicle Registration		

## FAMILY & FINANCIAL INFORMATION

### BANKING

	Location /Type	Other Info/Who to Contact
Your Bank Branch		
Spouse's Bank Branch		
Your Account Types		
Spouse's Account Types		
Your Credit Cards		
Spouse's Credit Cards		
Home and Property Loans		

### INSURANCE POLICIES

Home Insurance		
Health Insurance		
Vehicle Insurance		
Life & Disability Insurance		

### PENSION & INVESTMENTS

Company Pension Plan		
RRSP, LIRA, RRIF, LIF		
Investment Accounts		
Securities not with Broker		

### OTHER

Safe Deposit Box/Keys		
Important Keys		
Home Alarm		
Safe Combination		
Antiques and Heirlooms		
Jewelery		
Cash		
Pre-Funeral Arrangements		
Loyalty Rewards Programs		
Season Sports Tickets		

**NOTES:** \_\_\_\_\_  
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# FAMILY & FINANCIAL INFORMATION

## LIST OF ADVISORS

### WEALTH & INVESTMENT MANAGER

Firm	Tulett, Matthews & Associates	Name	Keith Matthews	Cindy Perera
Address	3535 St-Charles blvd., suite 703 Kirkland, Quebec H9H 5B9	Position	Partner	Associate
Phone	514-695-0096	Phone ext	106	108
Toll Free	866-695-0096	eMail	keith@tma-invest.com	cindy@tma-invest.com
Fax	514-695-9340	Name	Julie Desrosiers	Hugh Campbell
		Position	Associate	Partner
		Phone ext	105	103
		eMail	julie@tma-invest.com	hugh@tma-invest.com

### NOTARY/LAWYER (WILLS)

Name	
Firm	
Address	
Phone	
eMail	

### CORPORATE LAWYER

Name	
Firm	
Address	
Phone	
eMail	

### BANKER

Name	
Firm	
Address	
Phone	
eMail	

### ACCOUNTANT

Name	
Firm	
Address	
Phone	
eMail	

### FAMILY PHYSICIAN/PEDIATRICIAN

Name	
Firm	
Address	
Phone	
eMail	

### LIFE INSURANCE AGENT

Name	
Firm	
Address	
Phone	
eMail	

### CLERGY

Name	
Firm	
Address	
Phone	
eMail	

### GENERAL INSURANCE AGENT (prop., car, etc.)

Name	
Firm	
Address	
Phone	
eMail	

### ADDITIONAL NOTES: