



Personal record of important data and documents

Personal data of:

Date of last update:

Personal Information

Name: full, as on birth certificate, include also names under which you may have been known)

Social Insurance Number (SIN):

Date of birth:

Place of birth:

Current address:

Telephone:

Email:

Employment record:

Spouse's/Partner's information

Name: (include maiden name if applicable)

Social Insurance Number (SIN): Date of birth: Place of birth:

Current address:

Telephone: Email:

Children _____

List full name, date of birth, address and phone number for all children.

Location of personal documents

Birth certificate:

Social Insurance
Number (SIN):

Marriage/Divorce
certificates:

Passport:

Driver's licence:

Credit/Bank
cards:

Cheque book/
Bank accounts:

Safety deposit
box:

Key is located:

Computer login/usernames and passwords (hard drive, website, online banking, government, social media such as Facebook or Twitter):

Important contacts

Lawyer/Notary

Name:

Telephone:

Address:

Executor

Name:

Telephone:

Address:

Copy of will is located:

Power of attorney for personal care

Name:

Telephone:

Address:

Copy of document is located:

Physician – General practitioner/family doctor _____

Name:

Telephone:

Address:

Physician – Specialist _____

Name:

Telephone:

Address:

Hospital of record

Patient Registration Number:

Accountant _____

Name:

Telephone:

Address:

Financial Advisor _____

Name:

Telephone:

Address:

Insurance agent(s) _____

Life Insurance:

Contact:

Property Insurance

Name:

Contact:

Other

Name:

Contact:

Religious affiliations/Institution _____

Clergy Name:

Address:

Telephone:

Clergy Name:

Address:

Telephone:

Funeral arrangements

List preferences, and any details of pre-arranged funeral.

Pensions

Pension plan beneficiary:

Plan reference number:

Your last pension payment is at the end of the month of your death. Prompt notification ensures proper administration without overpayment claims on your estate.

Employer

Plan reference number:

RRSP/RRIF/Life Annuity located at:

Medical records/information

Current prescribed medication(s):

Name of pharmacy issuing medication(s):

List potential medical issues:

Other potential issues:

RTOERO health plan number:

Other health plan number:

Life insurance contract certificate number:

Life insurance contact:

Real estate

Residence located at:

Residence is owned: yes no

Residence is rented from:

Mortgage on property is held by:

Property insurance is held by:

Other property - List details:

Location of real estate documents

Property deed:

Mortgage:

Clubs, societies, alumnae and professional associations

List organizations which should be notified. (Some may carry insurance on members.)

Resources – Contact information

RTOERO Office	416-962-9463	1-800-361-9888
Ontario Teachers' Pension Plan	416-226-2700	1-800-668-0105
OMERS	416-369-2400	1-800-387-0813
Johnson Inc.	416-920-7248	1-877-406-9007