



## The Essential 40

### Pre-Planning Document Checklist

Taking charge of the important details and being prepared is a gift you give to your family, and yourself. Organizing your personal documents helps the people who care about you to have all the information they need – and it gives you peace of mind, too. We want to help you ensure that you are prepared so you can continue to focus on what matters most, sharing moments with your loved ones.

That's why we've put together this checklist, to help you collect the documents you need in one place. We suggest going through the list first and check-marking which documents are relevant to you and your family, then note where they can currently be found. You can then collect them in their own separate filing cabinet or banker's box; you can also colour-code these pre-planning documents so they are easily seen in your existing filing system. This may take a bit of time, but it will be time well spent.

We have made this list downloadable, so you can edit and make any notes that you need and keep track of your planning.

## Document Checklist:

1. Birth Certificate
2. SIN Card / Paper
3. Passport
4. Copies of driver's license
5. Marriage certificate
6. Divorce certificate
7. Adoption papers
8. Last will and testament
9. Living Will
10. Trust
11. Power of Attorney
12. Healthcare Power of Attorney
13. Organ Donor Directives
14. Medical Records
15. Immunization Records
16. Property Deeds
17. Cemetery Deeds
18. Mortgage Agreement
19. Investment Accounts
20. Rental Contracts
21. Health Insurance Policy
22. Car Insurance Policy
23. Home Insurance Policy
24. Life Insurance Policy
25. Property Tax Assessment
26. Stock Certificate
27. Citizenship Papers
28. Bonds
29. Retirement Account Information
30. Diplomas and Transcripts
31. Military Records
32. Receipts for Valuables
33. Pet Vaccination Records
34. Credit Card Documents
35. Funeral Contracts
36. Loan Documents
37. Vehicle Titles
38. List of passwords
39. Computer and Email information
40. A list of people to notify about your passing

## NOTES:

*Not listed above – the impact of your legacy.*

Leaving a gift in your will or estate plan can make a world of difference to many, and change the world of someone in need. By choosing Second Harvest as your charity of choice, you are empowering us to reduce the impact of food waste, as we work towards our goal of relieving hunger today and preventing it tomorrow.

To find out how you can let a world with No Waste, No Hunger be your legacy, contact:

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