



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:

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