

THE PEACE OF MIND SPREADSHEET

Date:

A practical guide to organizing important personal, financial, household and digital information for loved ones and executors.

⚠ Important Privacy Notice

This spreadsheet contains **confidential personal and banking information**, potentially including passwords. Store this document in a **secure location** and protect it from identity theft, data breaches, or cyber incidents. Avoid shared or unsecured devices. For added security, consider **printing and storing a copy in a safety deposit box or locked home safe**, and limit access to trusted individuals only.

For highly sensitive numbers, consider writing: 'Stored in home safe' rather than the actual number.

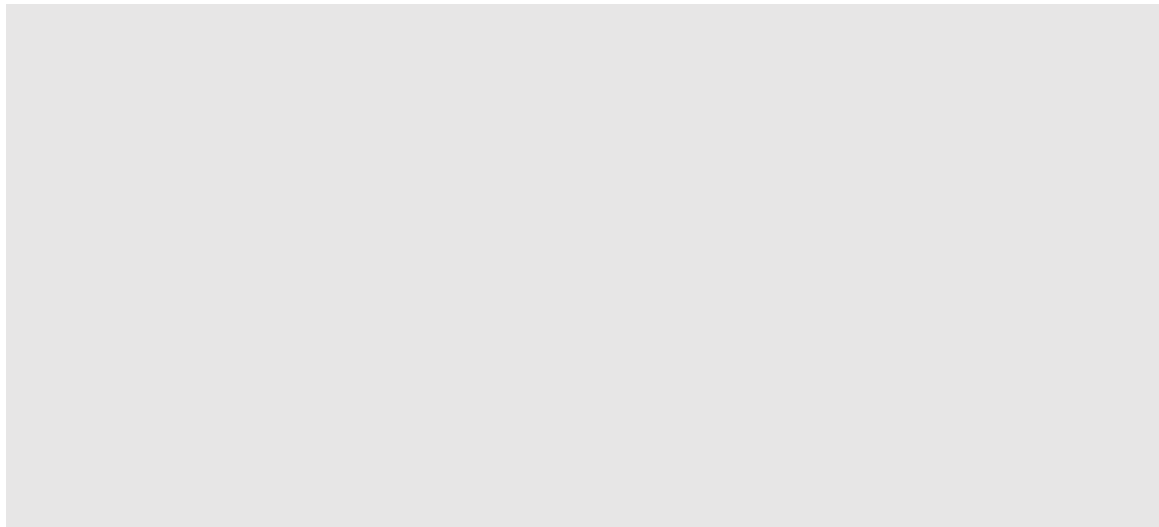
GENERAL INFORMATION

Legal Name:
Date of Birth:
Social Insurance Numbers:
Main Phone:
Email Address:
Home Address:
Citizenship:
Taxation:
Driver's Licence Number:
Passport Details:
Health Care Information:
Mother's Maiden Name:

IMPORTANT CONTACTS

Advisors (Names and Contacts):

Emergency Contact
Personal Financial Advisors
Personal Accountant
Lawyers
Insurance Advisor
Other



ASSETS	LOCATION / INSTITUTION	CONTACTS/ ADDITIONAL DETAILS/ PASSWORDS
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Cash and equivalents:
Chequing Accounts:
Savings Accounts:
Investments - RRSP:
Investments - LIRA:
Investments - TFSA:
Investments - RESP:
Investments - non-registered:
Personal residence:
Second residence and/or vacation property:
Other assets - Cash:
Other assets - Real Estate:
Vehicles:
Safety Deposit Box/ Location:
Home Safe Contents/Location:
Other Valuable Items and Appraisals:

LIABILITIES	LOCATION / INSTITUTION	CONTACTS/ ADDITIONAL DETAILS/ PASSWORDS
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Credit cards:

- Credit Card 1
- Credit Card 2
- Credit Card 3
- Credit Card 4
- Credit Card 5

Line of credit:

Auto loan:

Business loan:

Mortgage:

Second mortgage:

Deferred Property Taxes:

Other liabilities:

CORE LEGAL DOCUMENTS	LOCATION/ PROVIDER	NOTES/ POLICY NUMBER/ ADDITIONAL DETAILS
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Do you have a Will or Letter of Wishes?

Last Update

Do you have a Power of Attorney?

Executor Name and Contact Information:

Do you have any Insurance Policies?

Life Insurance

Extended Disability/Health Insurance

Mortgage Insurance

Home Insurance

Auto Insurance

Do you participate in any family trusts, corporations or other investment programs?

PROPERTY & ASSETS	LOCATION/ INSTITUTION
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Real Estate Owned and Addresses:

Property Alarm Codes/ Door Codes/ Garage Codes:

Mortgage Details (if applicable):

Property Tax Information:

MONTHLY BILLS & SUBSCRIPTIONS	LOCATION/ PROVIDER	ACCOUNT NUMBER/ AUTO PAYMENT Y/N
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Cell Phone:

Home Phone/Internet/Cable:

Utilities:

Hydro
Fortis

Netflix/ TV Apps:

Alarm Service:

Costco:

Airline Rewards:

Gym Memberships:

Other Subscriptions/ Memberships:

DIGITAL LIFE AND PASSWORDS**ACCOUNT INFORMATION**

Digital Password Manager:

Email Account(s) and Access:

Social Media Accounts and Access:

Cell Phone Access:

Laptop Access:

Two Factor Authentication Notes:

Other:

PERSONAL WISHES

Funeral or Celebration of Life Wishes:

Specific Requests of Messaging:

Pet Care Instructions:

Charitable Intentions:

Important Family Notes:

WHERE EVERYTHING IS KEPT

Where to Find Important Documents:

Digital File Locations:

Who Has Access:

Emergency Access Instructions:

Additional Notes:

ANNUAL REVIEW CHECKLIST

Update passwords and digital access information

Review banking and investment accounts

Confirm insurance policy information

Review subscriptions and memberships

Confirm location of will and estate documents

This worksheet is prepared as a personal organization tool to help simplify transitions and provide peace of mind for loved ones.

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