

Supplementary Forms

One of the most difficult jobs for the Executor is to locate all of the assets of the person who has died, and to know who to contact when the Will is being read. These forms allow you to keep all of your important personal details in one place, including a list of your assets, debts, and people to be contacted; they also allow you to express your funeral wishes. These forms will make the Executor's task much simpler.

It is a mistake to include a list of all of your assets in the Will itself. For example, if you are leaving your entire estate to a single person, such as a spouse, there is no need to list all of your assets in your Will. If you do this, you will have to make changes to your Will every time an asset is changed. This means that the document will have to be signed and witnessed each time, in the same way as the original Will.

These forms should be kept in the same location as your Will, but the information is not considered to be part of the Will document itself. This means that the information in these forms can be updated periodically and kept current to reflect any changes in your personal or financial situation, without needing to go through the same rigorous signing procedure as the Will.

These are not legal documents; they do not need to be signed and witnessed in the same way as the Will. They are simply for your personal records, designed to make the Executor's job easier.

Personal Details

Name _____

Previous Names _____

Address _____

Home Phone _____

Date of Birth _____

Social Insurance Number _____

Driver's license number _____

Location of Will _____

Location of Birth Certificate _____

Location of Marriage or Divorce Certificate _____

Location of other documents _____

Next of Kin

Name _____

Address _____

Relationship _____

Phone number _____

Other Next of Kin

Name _____

Address _____

Relationship _____

Phone number _____

Other Next of Kin

Name _____

Address _____

Relationship _____

Phone number _____

Executor

Name _____

Address _____

Relationship _____

Phone number _____

Solicitor

Name _____
Company _____
Address _____
Phone number _____

Doctor

Name _____
Address _____
Phone number _____

Accountant

Name _____
Company _____
Address _____
Phone number _____

Religious leader or minister

Name _____
Place of Worship _____

Others

Name _____
Position _____
Company _____
Address _____
Phone number _____

Name _____
Position _____
Company _____
Address _____
Phone number _____

Name _____
Position _____
Company _____
Address _____
Phone number _____

List of My Assets

Cash Investments

Bank _____

Branch _____

Account Number _____

Date of Maturity _____

Approximate Value on date _____ \$ _____

Bank _____

Branch _____

Account Number _____

Date of Maturity _____

Approximate Value on date _____ \$ _____

Safety Deposit Box

Bank _____

Branch _____

Account Number _____

Approximate Value on date _____ \$ _____

Stocks Shares and Funds

Company _____

Contact Name _____

Address _____

Date of Maturity _____

Approximate Value on date _____ \$ _____

Company _____

Contact Name _____

Address _____

Date of Maturity _____

Approximate Value on date _____ \$ _____

Company _____

Contact Name _____

Address _____

Date of Maturity _____

Approximate Value on date _____ \$ _____

Real Estate

Address _____

Location of Title Deed and other documentation _____

Address _____

Location of Title Deed and other documentation _____

Insurance

Type _____

Company _____

Policy Number _____

Date taken out _____

Approximate Value on date _____ \$ _____

Type _____

Company _____

Policy Number _____

Date taken out _____

Approximate Value on date _____ \$ _____

Retirement Savings Plan

Company _____

Policy Number _____

Approximate Value on date _____ \$ _____

Company _____

Policy Number _____

Approximate Value on date _____ \$ _____

Other (including motor vehicles)

List of My Debts and Liabilities

Real Estate Loans

Company or Bank _____

Branch _____

Contact Name _____

Loan Number _____

Date Taken Out _____

Amortization Date _____

Approximate amount owed on date _____ \$ _____

Other Loans

Company or Bank _____

Branch _____

Contact Name _____

Loan Number _____

Date Taken Out _____

Amortization Date _____

Approximate amount owed on date _____ \$ _____

Company or Bank _____

Branch _____

Contact Name _____

Loan Number _____

Date Taken Out _____

Amortization Date _____

Approximate amount owed on date _____ \$ _____

Private Loans

Name _____

Address _____

Contact Name _____

Account Number _____

Amortization Date _____

Approximate amount owed on date _____ \$ _____

Credit Cards

Company _____

Address _____

Contact Name _____

Account Number _____

Approximate amount owed on date _____ \$ _____

Company _____

Address _____

Contact Name _____

Account Number _____

Approximate amount owed on date _____ \$ _____

Company _____

Address _____

Contact Name _____

Account Number _____

Approximate amount owed on date _____ \$ _____

Company _____

Address _____

Contact Name _____

Account Number _____

Approximate amount owed on date _____ \$ _____

Company _____

Address _____

Contact Name _____

Account Number _____

Approximate amount owed on date _____ \$ _____

Taxes Owed

Approximate amount owed on date _____ \$ _____

People to be Notified Upon My Death

Name _____

Address _____

Phone number _____

Relationship _____

Name _____

Address _____

Phone number _____

Relationship _____

Name _____

Address _____

Phone number _____

Relationship _____

Name _____

Address _____

Phone number _____

Relationship _____

Name _____

Address _____

Phone number _____

Relationship _____

Name _____

Address _____

Phone number _____

Relationship _____

Name _____

Address _____

Phone number _____

Relationship _____