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File: _____

STATEMENT OF AFFAIRS OF _____

DATED _____

It would be advisable to review and/or update the list every three to four years when you renew the provisions of your will. Attach this list of assets to the copy of the will that you keep at home.

REAL ESTATE: (List all properties you now own or that you are purchasing under an Agreement for Sale).			
Owner	Title (sole or joint)	Civic and Legal Address	Estimated TOTAL Value

BANKS OR CREDIT UNIONS Owner Financial Institution Category Account Number Image: Im

ORGANIZATIONS

List places that you have equity in (i.e. Co-op's, Wheat Pool, farming organizations, etc.).

Owner	Organization	Membership/ Account Number

STOCKS, BONDS, SHARES, DEBENTURES			
OwnerOrganizationMembership/ Account NumberBroker's name and address			Broker's name and address

LIFE INSURANCE POLICIES			
Company Name	Owner	Policy Number	Name of Beneficiary

R.R.S.P.	
Financial Institution or Company R.R.S.P. Number	

BUSINESS INTERESTS List any businesses that you have an interest in or are involved with any buy-sell agreement.			
Name of Business	Name of Business % or Interest		

Notes: _____

FARM MACHINERY State if in partnership		
Type of Machinery	Year, Make and Model	Estimated Value

VEHICLES		
Description (Year, Make and Model)	Estimated Value	

MORTGAGES OR LOANS			
Type of Debt	Financial Institution	Account Number	Is it life insured?
			Yes 🗌 No 🗌
			Yes 🗌 No 🗌
			Yes 🗌 No 🗌
			Yes 🗌 No 🗌
			Yes No

OTHER ASSETS (Give location of any asset that isn't on your property.)		
Type of Asset	Description Estimated Value	

PASSWORDS, IDS, AND OTHER IMPORTANT NUMBERS (Give any important numbers or passwords. State any important phone numbers)		

SAFETY DEPOSIT BOX

Do you have one: yes 🗌 no 🗌	
Location	Box number
Where is the key	

FUNERAL DETAILS

Do you have a prepaid funeral yes no details:	
Plot: Purchased already yes no	
If purchased where?	
If not - I would prefer it to be at	
Type of funeral:	
Special instructions:	
Type of gravemarker or headstone?	
LEGAL AND TESTAMENTARY	
 I would like my income taxes done by They have done it in the past - yes no I would like the legal affairs of my estate to be handled by 	
I wish the following personal effects to be delivered to the following people as part of their portion of my estate:	
Item	Beneficiary

ATTACH A SEPARATE PIECE OF PAPER IF YOU NEED MORE ROOM FOR ANY OF THE ABOVE.