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BANKS OR CREDIT UNIONS

Owner	Financial Institution	Category	Account Number

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

Owner	Organization	Membership/ Account Number	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 <i>with any buy-sell agreement.</i>	
Name of Business	% or Interest

Notes: _____

FARM MACHINERY <i>State if in partnership</i>		
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 <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>

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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

1. I would like my income taxes done by _____

They have done it in the past - yes ☐ no ☐

2. 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.