



Legacy Workbook

Your Name:
Last Updated:
Next Review Date:

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1. Personal Information and Contacts

Use this page to record the most essential contact and identity details. These will help your loved ones manage your affairs quickly and without confusion.

Full Name:	
Date of Birth:	
Place of birth:	
Social Insurance Number:	
Health Card Number:	
Address:	
Emergency Contact(s):	
Dependents:	
Pets:	

2. Vital Documents

List where your important legal documents are stored. This saves your family the stress of searching for critical paperwork.

Type	Location (Filed, Safe, Safety Deposit Box)
Birth certificate	
Marriage/Divorce Certificate	
Passport(s)	
Citizenship/Immigration Papers	
Drivers License/ID Card	
Military Records	
Will	
Power of Attorney	
Advance Directives/Living Will	
Trust Documents	

3. Will & Estate Planning

This section helps clarify your legal plans and who is responsible for managing your estate. Keep this updated if you revise your will.

	Name	Contact
Executor (1)		
Executor (2)		
Power of Attorney		
Lawyer		
Financial Planner		
Other		

4. Financial Accounts & Assets

Record where your money, investments, and valuable belongings are held. This helps ensure nothing is overlooked or lost.

Canadian Bank Accounts	
Institution	Account Number
Foreign Bank Accounts	
Institution	Account Number
Investment Accounts	
Institution	Account Number
Real Estate Holdings	
Address	Mortgage Details

Vehicles

Make/Model	Registration Number
Type	Details
Make/Model	Registration Number
Type	Details
Make/Model	Registration Number
Type	Details

Other Assets Over \$5,000

Boat, art, jewelry, etc	Value/Details

5. Liabilities & Debts

Track your credit cards, loans, and outstanding bills so your estate can be settled smoothly and accurately.

Credit Cards	
Issuer	Account Number
Store Credit Cards	
Issuer	Account Number
Loans/Mortgages	
Type	Lender

Utility Bills

Provider	Account Number	Authorized Users

6. Insurance Policies

Include any insurance that may apply—life, health, home, auto—so your family knows what coverage exists.

Type	Provider	Policy #
Life (permanent)		
Life (term)		
Health		
Home		
Auto 1		
Auto 2		

7. Passwords & Digital Assets

Record access details for digital accounts, including banking, email, and social media. This eases transitions and prevents lockouts.

Type	Platform	User Name/Email
Password Manager		
Email		
Email		
Online Banking		
Online Credit Card		
CRA		

Social Media Accounts	User Name/Handle
Facebook	
Instagram	
X/Twitter	
LinkedIn	

8. Funeral & Final Wishes

Share any preferences or plans for your funeral or memorial. This can bring peace of mind to your loved ones and avoid uncertainty.

Use this sheet to record your wishes or add additional resources to this section of the binder.

Pre-arrangements:

Preferred Service Type:

Burial/Cremation Preferences:

Organ Donation: Yes / No

Obituary Preferences:

9. Best Practices & Maintenance

Review and Update

Review and update this binder every year to ensure all information remains accurate.

- Consider linking this review to an important date such as a birthday, wedding anniversary, or the start of a new year to establish a consistent routine.

Life changes should be reflected in the binder promptly:

- new accounts
- policy updates
- changes in family circumstances
- marriage or divorce
- birth or adoption of a child
- passing of a loved one
- changes in employment/income
- significant health diagnoses
- moving to a new residence

Safe Storage

Keep this binder in a fireproof safe, a locked filing cabinet, or a secure digital format.

- Avoid placing it where unauthorized individuals may find it.
- Scan important documents and store them securely.
- Use encrypted cloud storage services like Google Drive, Dropbox, or OneDrive with two-factor authentication, or save copies on an external hard drive or USB drive kept in a secure location.

Disposal

When removing outdated or sensitive documents, dispose of them securely by shredding paper copies and permanently deleting digital versions.

- For highly confidential information, consider using a cross-cut shredder or a professional document destruction service to prevent unauthorized access.

Sharing

Share the binder's existence and location with trusted family, executor, or attorney.

- Make sure they know how to access digital backups as well.
- Ensure they know the importance of keeping your legacy information confidential.

Legacy Information Workbook