PERSONAL AFFAIRS CHECKLIST

KINGSTON
ROSS
PASNAK LLP

Name

Address

Date completed

PAC to be held at

WHAT IS THE PERSONAL AFFAIRS CHECKLIST?

The Personal Affairs Checklist (PAC for short) is a document to help you keep a concise record of your personal affairs and papers. Investing a little time now to complete the PAC could save your spouse, partner, relatives or friends a great deal of time and expense in the future.

WHO IS PAC FOR?

The PAC is for everybody. It is organized in three sections;

- Section A covers information e.g. key advisors, location of your will etc., which might be needed quickly;
- Section B covers your financial affairs: bank accounts, insurance policies, other assets;
- Section C covers other general information e.g. employment record, membership of clubs, etc.

The form is designed to meet your many needs – you need only fill in those parts that are relevant to you.

WHAT DO I DO WITH THE COMPLETED PAC?

As the completed form will contain confidential information, we recommend you either

- keep the form somewhere safe, maybe in your bank or with your accountant, solicitor or attorney
- give the form to someone you trust to hold it (in a safe place) for you.

WHAT'S THE DIFFERENCE BETWEEN THE PAC AND MY WILL?

The PAC is not a Will and should not contain instructions about what should be done with your money or possessions. It is a record of where your personal records, assets and papers can be located.

SECTION A

My advisors are

Accountant	Doctor
Name	Name
Address	Address
Tel	Tel

Solicitor/Attorney	Priest/Clergyman/Rabbi
Name	Name
Address	Address
Tel	Tel

Undertaker	Other Advisors
Name	Name
Address	Address
Tel	Tel

Other Advisors	Other Advisors
Name	Name
Address	Address
Tel	Tel

In the event of my death or incapacity due to sudden illness please contact

Name

Address

Relationship

Tel

Name

Address

Relationship

Tel

My Will

The original of my Will is with/placed in

The Will is dated

The Will is drawn up by

Address

The Executors are

Grave Plot

Title Deeds may be found

Grave plot reference number

Funeral Arrangements (Note outlining your preferences may be found):

Power of Attorney and Personal Directives may be found

Medical Research Bequests/Donor Card may be found (eyes, kidney, etc.)

My wishes re: care of pets may be found

My deed/safe box may be found

The key may be found

Key Number

SECTION B

Account(s) – (Bank, Building Society, Post Office, Credit Union, etc.)

I have ☐ (number) accounts (Attach additional sheet if more then two accounts).

These accounts are held at the institution(s) indicated below.

Accounts are kept at

Name of Institution	Name of Institution
Address	Address
Tel	Tel
Account No.	

Private Company Investments – (Attach organization chart if needed)

Name of Company

Details of shares/shareholder loan

Name of Company

Details of shares/shareholder loan

Investments – (e.g. shares, stocks, unit trusts, bonds, saving certificates, etc.)

Type	May be found

Credit Cards

Type of card	Credit Card Number

Main Residence

Address

Joint Owner Name

Address

Tel

Location of Deeds

Mortgage Lender Name & Address

Account Number

Other Properties

Address

Joint Owner Name

Address

Tel

Location of Deeds

Mortgage Lender Name & Address

Account Number

Assurance/Insurance Policies/Personal Pension Plans e.g. Life, Car, Home, Health, Pension, RRSP, RRIF, TFSA

Policy Type	Policy Number	Name, Address & Telephone No. of insurance company	May be found

SECTION C

My Birth/Marriage Certificates may be found

Other documents relating to marriage may be found

Details of Employment

Company Name

Address

Tel

Employment Reference

Please contact

I am/am not a member of a company pension plan

Social Security/National Insurance number

Company Name

Address

Tel

Employment Reference

Please contact

I am/am not a member of a company pension plan

Social Security/National Insurance number

Directorships

Company Names

Taxation

The tax office which deals with my affairs is

Address

Tel

My Tax Reference Number

Tax Advisors (if any)

Associations, Clubs and Societies

(e.g. Charitable Societies, Trade Associations, Sports Clubs, Trade Union, Professional Bodies)

I belong to the following Associations:

Association

Address

Contact

Association

Address

Contact

Jewellery/Other assets – details may be found:

OTHER DETAILS

(Not covered by any section above):

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