

ESTATE PLANNING DOCUMENT CHECKLIST

Do you have the following documents in place? If so please include

- Will
- Power of attorney for property
- Power of attorney for personal care/representation agreement/personal care directive
- Statements of assets held at other financial institutions
- Statements of assets held at NBF
- Details of personal property e.g. collections (art/cars etc), vehicles, boats etc.

Do you own real estate? If so please include

- List of properties stating the purchase price and market value if possible and the type of ownership (joint with right of survivorship; tenants in common)
- Mortgage statement, details of loans and personal lines of credit

Do you have life insurance? If so please include

- List of individual life insurance policies (whole life, term, death benefit) with named beneficiaries

Are you in a subsequent relationship? If so please include

- Marriage contracts and co-habitation agreements
- Adult Interdependent Agreement
- Separation agreement

Do you have a holding company or business? If so please include

- Holding company – financial statements
- Shareholder's agreements

Other relevant documents

- Inter-Vivos /Family Trust Agreement