

Szpin's

This Estate Organizer

is for:

Estate owner

Prepared by

Date prepared

About this guide:

This document will become invaluable to you or to your family in the event of the death of the person whose information is contained herein.

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ESTATE PLANNING & PREPARATIONS

VITAL BIO DATA

Name: _____

Maiden Name: _____

Home address: _____

Phone: _____

Employer: _____

Occupation and title: _____

Social Insurance Number: _____

Military Service Serial Number: _____

Date of Birth: _____

Place of Birth: _____

Citizenship: _____

Father's name: _____

Father's birthplace: _____

Mother's maiden name: _____

Mother's birthplace: _____

Religious name (if any): _____

TO BE PAID checklist

- ☐ Cemetery property
- ☐ Memorials
- ☐ Funeral arrangements
- ☐ Cable / TV service
- ☐ Interment Service
- ☐ Clergy
- ☐ Florist
- ☐ Clothing
- ☐ Transportation
- ☐ Telephone and communication services
- ☐ Food and accommodation
- ☐ Doctor fees
- ☐ Nursing fees
- ☐ Hospitals and ambulance fees
- ☐ Pharmacy services
- ☐ Other current and urgent bills (mortgage or rent, taxes, installment payments)
other installment payments)

VITAL DOCUMENTS Checklist (to be collected)

- ☐ Will
- ☐ Birth Certificate
- ☐ Social Insurance Number
- ☐ Marriage licence
- ☐ Citizenship papers / passport # _____
- ☐ Insurance policies
(life, health, automobile, property)
- ☐ Bank books
- ☐ Deed to main residence
- ☐ Deed to secondary residence (vacation property)
- ☐ Ownership for car
- ☐ Ownership for other car(s) 1. ____ 2. ____ 3. ____
- ☐ Income tax returns, receipts or cancelled cheques
- ☐ Military discharge certificate
- ☐ Disability claims
- ☐ Cemetery Certificate of Ownership
- ☐ OHIP _____
- ☐ Foreign pensions
- ☐ CONSULAR Contact: _____
- ☐ Subscriptions / newspapers to stop: _____

TO BE NOTIFIED (as soon as possible)

CONTACT (Family / Friends) list and phone numbers:

A large, stylized, light gray cursive letter 'S' is positioned on the left side of the page. It is drawn on a background of horizontal ruling lines. The letter is formed by a single continuous stroke, starting with a small loop at the top left, curving down and to the right, then looping back up and to the left, and finally curving down and to the right again. The letter is light gray and has a thin black outline.

TO BE NOTIFIED (as soon as possible)

Pallbearers and phone numbers:

Insurance agents (life, health & accident) and phone numbers

Religious, fraternal, civic associations and phone numbers

Veterans organizations, unions and phone numbers

Newspapers regarding notices and phone numbers

DECIDE AND ARRANGE (BEST DONE BEFORE or WITHIN A FEW HOURS)

☐ **Contact funeral home**

- ☐ Cemetery lot location and which space to open
- ☐ Memorial type and inscription
- ☐ Casket type
- ☐ Clothing for deceased

☐ Vault or sectional crypt

☐ Proof read and sign necessary papers for burial permit

☐ **Clergy to officiate**

- ☐ Type of service (religious, military, fraternal)
- ☐ Special readings, from scriptures

☐ Location of service

☐ Time of funeral service

☐ Arranging for special religious services

☐ Decide name of charitable organization(s) to which donations are suggested in memory of deceased

☐ Funeral ceremony

☐ **Eulogy information**

☐ Selection of pall-bearers

☐ Flowers

☐ Music, organist, soloist

☐ Clothing for you and children

☐ **Home return for funeral guests return**

☐ Preparation at home, including food for family and guests

☐ Extra chairs

☐ Transportation for family and guests, including planning *funeral car list*

☐ Providing vital statistics about deceased to newspaper