

ROSS ESTATE LAW



ROSS ESTATE LAW

ESTATE  
EXECUTOR  
*workbook*

MEGAN@ROSSESTATELAW.CA

**Ross Estate Law**

www.rossestatelaw.ca

99 Wyse Road, Suite 1100

Dartmouth, NS

B3A 4S5

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# Personal Information



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Marital Status:

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Occupation:

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Date and Place of Marriage if Applicable:

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Mailing Address:

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Do you have a separation agreement or divorce order?

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Social Insurance Number:

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If common law, are you registered domestic partners?

Date and Place of Birth:

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Notes:

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# Beneficiary Information

PROVIDE THE NAMES AND  
CONTACT INFORMATION FOR ALL  
THE BENEFICIARIES LISTED IN  
YOUR WILL

BENEFICIARY  
# 1

BENEFICIARY  
# 2

BENEFICIARY  
# 3

BENEFICIARY  
# 4

BENEFICIARY  
# 5

BENEFICIARY  
# 6

BENEFICIARY  
# 7



# Guardian Information

PROVIDE THE NAMES AND  
CONTACT INFORMATION FOR  
GUARDIANS LISTED IN YOUR WILL,  
IF APPLICABLE

## GUARDIAN

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## ALTERNATE GUARDIAN

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# Banking Information

## ACCOUNT INFORMATION

BANK, ACCOUNT NUMBERS, WHETHER HELD JOINTLY  
AND WHO WITH

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## PERSONAL BANKER CONTACT

IF APPLICABLE, PROVIDE THE CONTACT INFORMATION  
FOR YOUR PERSONAL BANKER OR PRIVATE WEALTH  
MANAGER

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# Banking Information

## ONLINE BANKING INFORMATION

PROVIDE PASSWORDS AND CARD NUMBERS FOR YOUR  
ONLINE BANKING.

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NOTES:

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# Investments Information

## RRSP

FINANCIAL INSTITUTION, GROSS VALUE,  
BENEFICIARIES

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## RRIF

FINANCIAL INSTITUTION, GROSS VALUE,  
BENEFICIARIES

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# TFSA

FINANCIAL INSTITUTION, GROSS VALUE,  
BENEFICIARIES

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# RESP

FINANCIAL INSTITUTION, GROSS VALUE,  
BENEFICIARIES

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# OTHERS:

FINANCIAL INSTITUTION, GROSS VALUE,  
BENEFICIARIES

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# INVESTMENT ADVISOR CONTACT

IF APPLICABLE, PROVIDE THE CONTACT INFORMATION  
FOR YOUR PERSONAL BANKER OR PRIVATE WEALTH  
MANAGER

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## NOTES

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# Income Tax Information

TAX ADVISOR CONTACT:

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MY CRA LOGIN  
INFORMATION:

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The logo consists of the letters 'R' and 'E' in a serif font, with a diagonal slash between them. The 'R' is positioned above the 'E', and the slash runs from the top right of the 'R' down to the top left of the 'E'.



# Insurance Policies

LIST POLICY NUMBER, TYPE  
OF POLICY, INSURANCE  
COMPANY, BENEFICIARY  
LISTED ON THE POLICY,  
AND CONTACT OF ANY  
INSURANCE BROKERS YOU  
WORK WITH

## LIFE INSURANCE

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## HOME INSURANCE

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# Insurance Policies

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## CAR INSURANCE

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## PET INSURANCE

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## DISABILITY INSURANCE

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# Insurance Policies

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## OTHER POLICIES

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## NOTES:

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# Digital Assets

LIST ANY SOCIAL MEDIA ACCOUNTS YOU USE INCLUDING USERNAME AND PASSWORDS

# Online Account Access

PROVIDE LOGIN INFORMATION FOR ANY ONLINE ACCOUNTS YOU USE FOR INSURANCE POLICIES, TAXES AND HOUSE UTILITIES.

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# Pensions

LIST ANY PENSIONS THAT  
YOU RECEIVE, AND IF IT  
HAS SURVIVORSHIP  
BENEFITS

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PENSIONS

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ARE YOU A VENTRAN?

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# Liabilities

LIST ANY DEBTS YOU HAVE INCLUDING MORTGAGE, CAR PAYMENTS, CREDIT CARDS, PERSONAL LOANS AND ANY OTHER

MORTGAGE

CAR LOAN

CREDIT CARDS

PERSONAL  
LOANS

OTHER

OTHER

OTHER





“It takes as much energy to  
wish as it does to plan.”  
*Eleanor Roosevelt*



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# Thank-you!

Thank you for taking the time to prepare this for your executor. We will send a friendly reminder to update this information in a few years! If you need anything else, please don't hesitate to contact Ross Estate Law.

## Contact:

[megan@rossestatelaw.ca](mailto:megan@rossestatelaw.ca)

(902) 403-0008

99 Wyse Road, Suite 1100

Dartmouth, Nova Scotia

B2t4S5



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