Start here

Who to call first, who knows where this planner is, and what is in it

This planner is not for an estate in Quebec, and it is general information, not legal advice.

This planner is where you write down what your family would otherwise have to go looking for: who to tell, where the accounts and papers are, and what you would like done.

Fill it in at your own pace, by hand or on screen, and come back to it whenever something changes. Nothing you write in it reaches us.

Every fact we print carries the date we read it. A fact we could not confirm, or one we have not checked recently, is left out rather than guessed.

If something has happened, the first person to call

Name _____ **Phone** _____

Write them in by hand or type them on screen. The same name and number go on the cards at the back.

Who knows where this planner is

Name	_____	**Phone or email**	_____
Name	_____	**Phone or email**	_____
Last brought up to date	_____		

I · Your records

Eight sheets for what your family would otherwise have to go looking for.

Who to tell

The people and organizations that should hear first: family, your executor, your employer, your doctor, your lawyer if you have one.

1 **Name** _____ **Relationship or role** _____

Phone or email _____

2 **Name** _____ **Relationship or role** _____

Phone or email _____

3 **Name** _____ **Relationship or role** _____

Phone or email _____

4 **Name** _____ **Relationship or role** _____

Phone or email _____

5 Name

Relationship or role

Phone or email

6 Name

Relationship or role

Phone or email

7 Name

Relationship or role

Phone or email

8 Name

Relationship or role

Phone or email

Notes