

CONFIDENTIAL

ESSENTIAL INFORMATION

Organizer

Date Completed

Name

Using this Organizer

When your estate needs to be settled, there are important documents that must be located, benefits to be applied for and paperwork to be completed.

The Essential Information Organizer is designed to enable you to record the necessary facts for your family, your attorney and your executor.

A husband and wife should each make their own copy, even though much of the information may be duplicated.

We suggest you keep it and place it in a safe place so it will be there for possible revisions by you and later use for your family.

It is our hope that this information will give you peace of mind, knowing this information is readily available when needed. We also hope that in addition to guiding your own family as to your wishes, you may also be able to help a friend or relative who has not had the foresight to prepare.

Additional copies of this Organizer are available without charge at

The Lakefield Cemetery & Crematorium Office
1262 Buckhorn Road - Lakefield, Ontario K0L 2H0

or our website at <http://www.lakefieldcemetery.com>

You can contact us by

Phone: (705) 652-3252

Weekdays 9:00 am - 5:00 pm

Email: lakefield.cemetery@on.aibn.com

Insurance

Each company requires a certified copy of the death certificate when application is made for life insurance benefits.

Life Insurance Policy List

Company	Location	Policy Number	Amount
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Agent	Phone Number	Primary Beneficiary
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Company	Location	Policy Number	Amount
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Agent	Phone Number	Primary Beneficiary
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Company	Location	Policy Number	Amount
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Agent	Phone Number	Primary Beneficiary
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Accident and Health Insurance

Company	Location	Policy Number	Covered
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Agent	Phone Number	Primary Beneficiary
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Company	Location	Policy Number	Covered
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Agent	Phone Number	Primary Beneficiary
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Company	Location	Policy Number	Covered
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Agent	Phone Number	Primary Beneficiary
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Financial Information

Banking and Investment Information

Type of Account

Account Number

Bank/Branch

Investments

Certificate Number

Bank/Branch

Charge Accounts and Credit Cards

Company

Account Number

Phone Number

Real Estate Owned

Description of Property

Assessed Owners

Roll Number _____

Municipality _____

Description of Property

Assessed Owners

Roll Number _____

Municipality _____

Description of Property

Assessed Owners

Roll Number _____

Municipality _____

Funeral and Cemetery Arrangements

AT MY REQUEST, _____ has consented to carry out the following arrangements in accordance with my wishes:

MY WILL. Dated _____ is deposited at _____

The Executor/Executrix I have chosen is _____

Type of Funeral Service

Funeral planning is an extension of will and estate planning. It allows you to choose the specific items you want and need and compare prices offered by several funeral providers. Once arrangements are made, indicate your preferences below.

Funeral Home _____

Funeral Director _____ Phone Number _____

Traditional

Open casket with visitation, followed by a memorial service.

Limited

Open casket with a memorial service.

Direct Disposition

No service with the casket present.

Please indicate what, if any, service have been prepaid _____

Cemetery Arrangements

My preference is Burial Cremation

One other important consideration is where the remains will be placed. It is in the family's best interest to obtain cemetery property before it is needed.

Cemetery _____

Phone Number _____ Lot Location _____