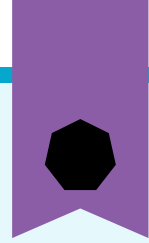


# Prepare for the unexpected – organize your finances



If you were to become injured or incapacitated, having your financial affairs in order will make it easier for someone you trust to help manage your finances for the short or longer term. Have a file that includes important documents and information.

## Financial assets

- List all your bank accounts, investment accounts and credit cards
- Addresses and contact person(s)
- A copy of the latest account statement(s)

## Regular expenses, payments and debts

- List all your regular bills (utilities, insurance premiums, lawn care services etc.) and frequency of payments
- Information for any automatic deductions/ payments
- List all your debts (credit card, mortgage, line of credit or loans) and relevant information

## Estate documents

- List the documents (will, power of attorney etc.) and where to find them
- Contact information for the individuals who prepared the documents or are named as attorney or executor

## Sources of income

- List all your sources of income (annuities, pensions, government benefits, dividends etc.)
- Include where the documents are filed and contact information

## Other documents and valuables

- Pre-planning arrangements and agreements
- Insurance policies – life and property – policy numbers and contact information
- Copies of personal documents such as passport, birth certificate, marriage/divorce certificate, deed for your home etc.
- Appraisals for any valuables such as art or jewelry and where located
- Safety deposit box information and where to find the key

## Electronic devices and online accounts

- List of electronic devices and passwords
- List of online accounts including social media accounts and passwords

Learn more at [GetSmarterAboutMoney.ca](https://www.getsmarteraboutmoney.ca)

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