

# My Personal Affairs Record Keeper

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A Handy Record of  
Financial & Personal Information  
for me & my Trusted People

# The Record Keeper

## *A DIY Guide to Organizing Personal Information*

In the event of an emergency, death or incapacity, it's critical that your loved ones or a trusted person acting with Power of Attorney have access to your important personal information.

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My Financial Record Keeper helps you keep track of all your personal affairs, and provides the trusted people in your life with quick access to information should they need it.

It doesn't take long to fill this out, saving family and loved ones from what could be needless hours of searching for documents and contacts.

Once complete, keep in a safe, secure space and advise your loved ones, executor, or POA where they can find this single document.

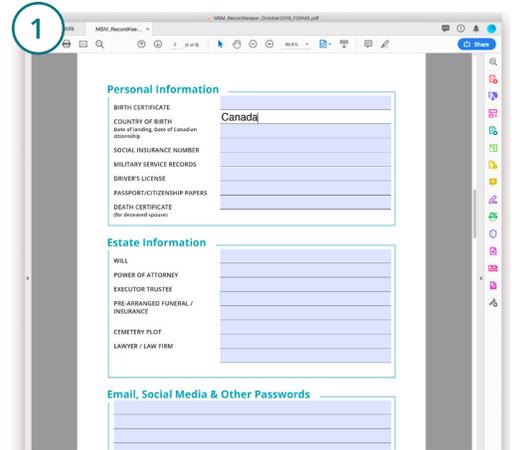


**We strongly recommend storing this document in a safe, secure location that only trusted individuals are made aware of.**

# Instructions

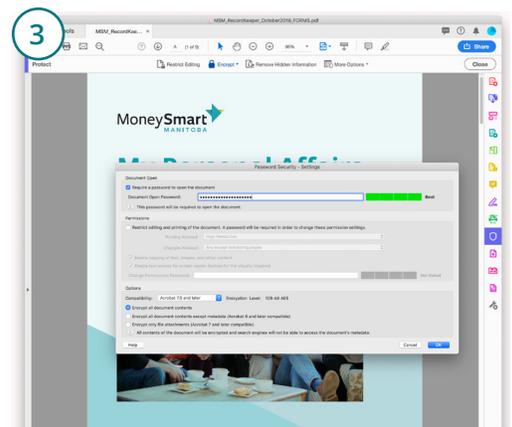
## COMPLETING THIS DOCUMENT

1. Use digital fields to complete applicable information in this form
  - Press tab to quickly move to the next field (*figure 1*)
2. Ensure you are saving your work as you complete this document
  - It is highly recommended that this document is secured with a password and encryption as soon as you start (see instructions below)
  - Ensure the file is saved to a secure location that will be accessible by your loved ones or trusted person acting with Power of Attorney (POA)



## HOW TO SAVE DOCUMENT WITH ENCRYPTION AND A PASSWORD

1. To secure your document with a password and encryption, you will need Adobe Acrobat PRO DC installed (this is an enhanced version over Adobe Acrobat Reader)
  - You can start a free trial or subscribe to Adobe Acrobat PRO DC at: <https://get.adobe.com/reader/>
  - If you are using the free trial, ensure you password protect your document before the free trial is over. Following the trial, you can continue to edit your document using Adobe Acrobat Reader
2. Adding Password with Encryption
  - From the Tools Side Bar, click on the Protect icon (*figure 2*) (If the Tools Side bar is not visible, from the top menu click on: View > Tools > Protect > Open)
  - Click on the Encrypt button/dropdown and select "2 Encrypt with Password"
  - You may be asked if you are sure you wish to change the security of the document – click Yes and proceed to the next screen
  - The "Password Security – Settings" screen should pop up (*figure 3*)
  - Mark / Select the "Require a password to open document" check-box
  - Enter a password in the "Document Open Password:" field
  - Make note of this password in a secure location and only share with trusted individuals who require access. **Ensure you can remember the password. You will not be able to recover any data from the file without this password.**
  - Press the "OK" button, once you're satisfied with your chosen password and settings
  - You will be prompted to enter your password again
  - Enter your password then Press "OK"



For more information on securing your document, visit:  
<https://helpx.adobe.com/acrobat/using/securing-pdfs-passwords.html>

## Personal Information

BIRTH CERTIFICATE

COUNTRY OF BIRTH

Date of landing, Date of Canadian citizenship

SOCIAL INSURANCE NUMBER

MILITARY SERVICE RECORDS

DRIVER'S LICENSE

PASSPORT/CITIZENSHIP PAPERS

DEATH CERTIFICATE

(for deceased spouse)

## Estate Information

WILL

HEALTH CARE DIRECTIVE

POWER OF ATTORNEY

EXECUTOR TRUSTEE

PRE-ARRANGED FUNERAL /  
INSURANCE

CEMETERY PLOT

LAWYER / LAW FIRM

## Email, Social Media & Other Passwords

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## Important Documents

**MARRIAGE LICENSE**

Province/Country of Marriage

**DIVORCE RECORDS**

**SEPARATION AGREEMENT**

**PRE/POST NUPTIAL AGREEMENTS**

**CUSTODY PAPERS**

## Financial Info & Assets

**BANK ACCOUNT(S)**

INSTITUTIONS, HOLDINGS,  
CHEQUING/SAVINGS ETC.

**INVESTMENTS**

TFSAs, RRSPs, RESPs, ETFs,  
STOCKS, MUTUAL FUNDS, BONDS

**DEBT**

CREDIT CARDS / LINES OF CREDIT /  
OTHER LOANS/LIENS

## Financial Info & Assets

LIFE INSURANCE POLICY	_____
CRITICAL ILLNESS INSURANCE	_____
	_____
PENSION(S)/BENEFITS	_____
PREVIOUS YEAR'S TAX RETURNS	_____
LOCATION OF PERSONAL ITEMS OR KEEPSAKES (Especially those identified in the will)	_____
	_____
	_____
	_____

## Financial Contacts

FINANCIAL PLANNER & ADVISER	_____
	_____
ACCOUNTANT	_____
LAWYER	_____
LIFE INSURANCE AGENT	_____

## Keys, Mailbox, Safety Deposit Box, etc.

_____
_____
_____
_____
_____

## Home & Other Properties

LIST OF ALL PROPERTIES

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MORTGAGE OR RENTAL DOCUMENTS

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UTILITY BILLS

LIST providers/account numbers for power, cable, phone, internet, water/sewer, etc.

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HOMEOWNERS OR TENANTS INSURANCE

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PROPERTY TAX BILL(S)

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DEEDS/TITLES FOR PROPERTIES

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## Pets / Veterinarian

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## Automobile & Other Vehicles

REGISTRATION  
(List all vehicles)

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LOANS/FINANCING

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INSURANCE

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## Health Information

NAME OF DOCTOR(S)

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MEDICATION

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MEDICARE NUMBER

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MEDICAL RECORDS

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HEALTH INSURANCE

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DISABILITY INSURANCE

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**Looking for useful, unbiased information?  
Here are some helpful websites that might  
come in handy:**

[www.moneysmartmanitoba.ca](http://www.moneysmartmanitoba.ca)

[www.gov.mb.ca/seniors](http://www.gov.mb.ca/seniors)

[www.gov.mb.ca/publictrustee/](http://www.gov.mb.ca/publictrustee/)

[www.aosupportservices.ca](http://www.aosupportservices.ca)

# My Record Keeper

DATE OF CREATION/UPDATE	_____
NEXT UPDATE IS SCHEDULED FOR (It is a best practice to update this information annually)	_____ _____
TRUSTEES LIST: all trustees who will receive a copy of this document	_____ _____ _____ _____ _____

## Notes

Large empty rectangular area for notes.