



Financial Services

AndrewWBradley.ca

Helping families piece together their financial puzzle

Get Organized!



LIFE IS BETTER WHEN YOU'RE PREPARED.™

Experience teaches us that life can change in a moment and when you least expect it. Are all your personal and financial documents and information in order? Are your records easy to find? Is your family prepared?

Take a few minutes to complete the Personal & Financial Organizer today. It's designed to keep your family's key financial and personal information organized and available in one place. It will help you bring together important information on investments, insurance policies, and wills. The organizer also lists vital medical, dental and legal information with addresses and telephone numbers for you and your family.

Store the organizer in a safe and private location so all family members will know where to find it. PIN numbers and passwords should be kept separately. Consider keeping a copy of this document in a secure location outside of your home – for example, in a safety deposit box.

If you need assistance filling out this form or have any questions, please contact your advisor today. Life is better when you're prepared.™

Personal & Financial Organizer

Date:

SELF

Full legal name	Cell phone
Email	
Address	
Birth date	SIN #
Driver's licence #	Passport #
Health card #	
Blood type	Allergies
Medications and dosages	
Primary care physician name	Phone
Dentist name	Phone
Specialist name, address	Phone
Employer name, address	Phone
Supervisor name	Phone
Car ownership and registration #	

SPOUSE

Full legal name	Cell phone
Email	
Address	
Birth date	SIN #
Driver's licence #	Passport #
Health card #	
Blood type	Allergies
Medications and dosages	
Primary care physician name	Phone
Dentist name	Phone
Specialist name, address	Phone
Employer name, address	Phone
Supervisor name	Phone
Car ownership and registration #	

EMERGENCY CONTACT LIST

Name	Relationship	Home phone	Cell phone
Name	Relationship	Home phone	Cell phone

CHILDREN

Name Birth date
Cell phone Email
SIN # Passport #
School/employer name
Address
Teacher/supervisor name Health card #
Blood type Allergies
Medications and dosages

Name Birth date
Cell phone Email
SIN # Passport #
School/employer name
Address
Teacher/supervisor name Health card #
Blood type Allergies
Medications and dosages

Name Birth date
Cell phone Email
SIN # Passport #
School/employer name
Address
Teacher/supervisor name Health card #
Blood type Allergies
Medications and dosages

Other Important Contacts (i.e., daycare provider, specialist, dentist)

Name Profession
Address Phone
Name Profession
Address Phone

PETS

Veterinarian name, address Phone
Pet names
Special considerations

INVESTMENTS

RRSP account # Company Phone
RESP account # Company Phone
Non-registered account # Company Phone
TFSA account # Company Phone
RRIF/LIF account # Company Phone
Pension/DPSP account # Company Phone
Other

INSURANCE

Personal

Life insurance policy # Company Phone
Term insurance policy # Company Phone
Health care benefits policy # Company Phone
Disability policy # Company Phone
Long-term care policy # Company Phone
Critical illness policy # Company Phone

Household and Auto

Home insurance company/agent name
Homeowner policy # Phone
Auto insurance company/agent name
Auto policy # Phone

PROFESSIONAL CONTACTS

Advisor's name Andrew W Bradley Phone 613-286-6841 / 613-232-1432
Firm name and address AndrewWBradley.ca Financial Services | 2100 Thurston Dr Suite 13B Ottawa, Ontario K1G 4P8
Account #1 Account #2

Other Contacts

Lawyer's name Phone
Firm name and address
Accountant's name Phone
Firm name and address
Other professional Phone
Firm name and address
Executor's name Phone
Power of Attorney (personal care) name Phone
Power of Attorney (property) name Phone

BANK

Bank name, address Phone
Chequing # Savings #
Safety deposit box #
Bank name, address Phone
Chequing # Savings #
Safety deposit box #

LOANS & CREDIT

Mortgage holder name
Address Phone
Account #
Second mortgage holder name
Address Phone
Account #
Home equity loan / line of credit holder name
Address Phone
Account #
Car loan firm name
Address Phone
Account #
Credit card type Company name
Billing address Phone
Account #
Credit card type Company name
Billing address Phone
Account #
Other
Address Phone
Account #

This document should always be kept in a safe and private location. Please do not write any PINs or passwords on this form.