

# End-of-Life Planning Checklist (Canada)

This checklist helps Canadians organize essential documents, finances, and key decisions to ease the burden on loved ones during a difficult time.

## Personal Information

- Full legal name
- Date and place of birth
- Social Insurance Number (SIN)
- Current address
- Marriage or divorce documents
- Immediate family contacts

## Key Contacts

- Executor of your will
- Lawyer or notary
- Financial advisor
- Insurance broker
- Accountant
- Employer or HR contact

## Legal Documents

- Last Will and Testament (province-specific rules apply)
- Powers of attorney (financial and medical)
- Guardianship designations for minor children
- Trust documents (if applicable)
- Location of original documents noted

## Financial Accounts

- Bank accounts
- Investments (RRSP, TFSA, non-registered)
- Life insurance policies
- Property and mortgages
- Vehicles and valuables

## Debts

- Mortgage
- Credit cards
- Loans or lines of credit

Medical bills

### Household Bills & Subscriptions

- Utilities (gas, hydro, water, sewer)
- Internet, TV, and phone plans
- Streaming services and software subscriptions
- Memberships and donations

### Digital Assets

- Email accounts
- Social media accounts (memorialization or deletion wishes)
- Password manager access
- Websites or domains

### Employment & Benefits

- Employer contact information
- CPP, OAS, and pension plans
- Group insurance benefits
- Stock options or bonuses
- Unused vacation or sick time

### Funeral & Final Wishes

- Burial or cremation preference
- Funeral or memorial service wishes
- Preferred funeral home
- Pre-paid arrangements

### Dependents & Pets

- Guardian preferences for children
- Financial provisions for dependents
- Pet care instructions and caregiver