

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