

Personal Information Booklet

A guide to assist you in compiling and documenting personal, financial and estate information for your family or your estate executor.

This booklet could be the greatest gift you leave for the person responsible for looking after your affairs if you become seriously incapacitated or when you pass away.

The booklet will document your personal & financial information that is helpful in managing your affairs.

Most of us believe that we have lots of time to “get our affairs in order”. Whether it is the gradual creep of dementia, a sudden or severe illness that renders us incapable of managing our affairs, and, yes, even sudden death, this booklet is your guide to being prepared.

The booklet will document your personal & financial information that is helpful in managing your affairs. Let your family or executor know that you have completed it and where it will be located. Then put it in an envelope and tuck it away. If any of the information changes, such as banking, then simply update the booklet and put it away again. You may also wish to give your executor a copy.

This is not a legal document; this is not a substitute for a legal Will or an estate plan. However, your lawyer or financial advisor will be very pleased if you complete this in advance as they will ask you for much of the same information. It will save you time and money.

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Thank you for your support of the Ajax Pickering Hospital Foundation.

If you have any questions, including leaving a gift in your Will toward patient care, please do not hesitate to contact us at **905.683.2320 x11501** or **aphfoundation@lh.ca**.

There are many reasons to consider a charitable bequest and it can be a powerful tool for reducing estate tax. You do not need to be wealthy to make a lasting impact with a legacy gift.

**Ajax
Pickering
Hospital
Foundation**

Being Prepared

Family and friends face many difficult issues when they need to look after the affairs of a loved one. This booklet allows you to include details about your personal and financial affairs in one place. It might take a little time to prepare but it will be one of the most caring gifts you can leave to your family.

Let your family know
your wishes in this book.

Everyone Needs a Will...

... Or the Province of Ontario, through the Ontario Succession Law Reform Act, will decide for you. That's right – without a Will everything that you worked so hard for over your lifetime will be disposed of by a government bureaucrat.

Everyone needs a Will, regardless of the size and complexity of their assets. Preparing a legal Will ensures that your estate and possessions will be distributed exactly as you wish after your death, ensuring that your legacy is preserved exactly as you intended. This is especially important if you have a blended family.

We're Here to Help

If you do not have a lawyer or professional adviser, we can help connect you to resources that are available in our community.

We also have a guide to help you organize your thoughts around preparing a Will or an estate plan. The Ajax Pickering Hospital Foundation is not a legal adviser so it is essential that you consult with certified professionals.

We can also provide assistance on:

- ▶ How current charitable gifts can increase your lifetime income and save taxes
- ▶ How to include Ajax Pickering Hospital Foundation or other charities in your Will
- ▶ Different ways to leave a charitable bequest in your Will

Personal Information

Full Legal Name _____

Name at Birth (if different from above) _____

Address _____

Street

City

Province

Postal Code

Social Insurance Number _____

Home Telephone Number _____

Cell Number _____

Place of Birth _____

City/Town

Province

Postal Code

Date of Birth _____

Month

Day

Year

Father's Name _____

Mother's Maiden Name _____

Citizenship _____

Do you have dual citizenship? Yes No

(if yes, the appropriate embassy will need proof of citizenship and other government information such as social insurance number in the USA)

Do you have a passport? Yes No

If yes, where is it kept? _____

Do you have a driver's license? Yes No

If yes, issued by which province? _____

Marital Status Married Common Law Never Married
 Divorced Separated Widowed

Spouse's Name _____

Date of Marriage _____
 Month Day Year

Place of Marriage _____
 City Country

Where do you keep your paper files? _____

Location of safe _____

Key location or combination _____

Location of fireproof box _____

Key location or combination _____

Does someone make regular visits to your home (e.g. to clean or provide care)?

Organ Donation

Are you an Organ Donor? Yes No

Personal Information

Next of Kin

Name _____ Relationship _____

City of Residence _____ Phone # _____

Email _____

Name _____ Relationship _____

City of Residence _____ Phone # _____

Email _____

Name _____ Relationship _____

City of Residence _____ Phone # _____

Email _____

Name _____ Relationship _____

City of Residence _____ Phone # _____

Email _____

Employment History

Present (or Former) Employer _____

Address of Employer _____

Date of Retirement (if applicable) _____

Month

Year

Pension Benefits Yes No

Member of a Labour Union Yes No

Name of Local _____

Address _____

Street

City

Province

Postal Code

Online Accounts

In today's day & age, a lot of our activity is completed online, both for personal and financial purposes. Even though our user names & passwords are to be kept secret, it can be helpful for your executor to be able to electronically access your different accounts.

	Username	Password
Computer	_____	_____
Laptop	_____	_____
iPad	_____	_____
Cell phone	_____	_____

Where do you store your user name & passwords?

	Username	Password
Banking	_____	_____
Email	_____	_____
Utilities	_____	_____
	_____	_____
	_____	_____
Other	_____	_____

Social Media Accounts

Unless you have shared your login information to your social media accounts, if no-one tells the site you're dead, your account can stay "active" until the site itself no longer exists.

Different sites have different processes, for example:

Facebook: In your account, you can set up a "Facebook Legacy Contact" who can "memorialize" or delete your account.

Instagram: Verified family members with proper proof upon death can request the page be "memorialized" or deleted.

Google+: There's a "contact if site is inactive" list of people you can set, who will be contacted if you don't use your account in a certain amount of time.

Twitter, Pinterest: An immediate family member must present a copy of their ID and death certificate for the account to be deleted.

Social Media Platform	Username	Password
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Financial Information

Automatic Payments

What expenses are automatically withdrawn from your bank account or credit card?

- Television
- Internet
- Telephone / Cell phone
- Subscriptions to magazine or newspaper _____

- Subscriptions to Amazon, Prime, Netflix, Crave etc _____

- Utilities _____

- Insurance _____

- Charitable Donations _____

- Other _____

Bank Accounts

	Institution	Account Number(s)	Is this a joint account?
Chequing	_____	_____	_____
Chequing	_____	_____	_____
Savings	_____	_____	_____
Savings	_____	_____	_____
Other	_____	_____	_____
Brokerage	_____	_____	_____

Credit Cards

Type of Card	Card Number	Exp Date	CVV
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Financial Information

Income Sources

Canadian Pension Plan Yes No

Old Age Security Yes No

Pension from a country other than Canada _____

Contact to stop direct deposit payments _____

Other Pension or Annuity Income

Income Source

Monthly Amount

RSP/RIF Information

Institution

Account Number

Safety Deposit Box Information

Institution _____

Address _____

Box Number _____

Key Number _____ Key Location _____

Persons Having Access _____

Phone Number _____

Other Financial Assets

Such as Canada Savings Bonds, GICs, CDs, etc

Description	Location	Asset Number
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Stocks & Shares

Description	Quantity
_____	_____
_____	_____
_____	_____
_____	_____

Assets

Automobile

Year

Make

Model

Real Estate / Property

Property #1 Description _____ Sole Owner Co-owner

Address _____
Street

_____ City Province Postal Code

Property #2 Description _____ Sole Owner Co-owner

Address _____
Street

_____ City Province Postal Code

Other Assets

Asset

Description

Debts or Loans

Mortgage Information

Institution _____ Mortgage Number _____

Payment Amount and Schedule _____

Date of Completion _____

Car Loan

Institution _____

Payment Amount and Schedule _____

Date of Completion _____

Line of Credit

Institution _____

Account Number _____

Other

Insurance

Medical / Healthcare

OHIP (or other Healthcare Insurance) _____

Supplementary Medical Insurance _____

Supplementary Policy Number _____

Other Medical Insurance _____

Life

Insurance Company _____ Policy Number _____

Beneficiary of Policy _____

Agent _____ Phone Number _____

Insurance Company _____ Policy Number _____

Beneficiary of Policy _____

Agent _____ Phone Number _____

Insurance Company _____ Policy Number _____

Beneficiary of Policy _____

Agent _____ Phone Number _____

Automotive

Insurance Company _____ Policy Number _____

Agent _____ Phone Number _____

Property

Insurance Company _____ Policy Number _____

Agent _____ Phone Number _____

Disability

Insurance Company _____ Policy Number _____

Agent _____ Phone Number _____

Other

Type _____

Insurance Company _____ Policy Number _____

Agent _____ Phone Number _____

Power of Attorney

Power of Attorney for Financial Matters and Property

Name _____ Company _____

Address _____

Street

City

Province

Postal Code

Phone _____ Email _____

Name _____ Company _____

Address _____

Street

City

Province

Postal Code

Phone _____ Email _____

Power of Attorney for Personal Care

Name _____ Company _____

Address _____

Street

City

Province

Postal Code

Phone _____ Email _____

Name _____ Company _____

Address _____

Street

City

Province

Postal Code

Phone _____ Email _____

Estate Planning

Solicitor

Name _____ Company _____

Address _____
Street

_____ City Province Postal Code

Phone _____ Email _____

Financial Advisor

Name _____ Company _____

Address _____
Street

_____ City Province Postal Code

Phone _____ Email _____

Last Will and Testament

Date of Will _____ Date of Codicil _____
(if applicable)

Who Prepared Your Will? _____

Location of Original Copy _____

Additional Copies With _____

Executor(s)

Name _____

Address _____

Street

City

Province

Postal Code

Phone _____ Email _____

Name _____

Address _____

Street

City

Province

Postal Code

Phone _____ Email _____

Name _____

Address _____

Street

City

Province

Postal Code

Phone _____ Email _____

Estate Settlement

Accountant

Name _____ Company _____

Address _____
Street

City

Province

Postal Code

Phone _____ Email _____

Tax Returns

Where are the prior year records kept? _____

Who prepares your tax return? _____

Banker / Financial Representative

Name _____ Company _____

Address _____
Street

City

Province

Postal Code

Phone _____ Email _____

Broker

Name _____ Practice _____

Address _____

Street

City

Province

Postal Code

Phone _____ Email _____

Physician

Name _____ Practice _____

Address _____

Street

City

Province

Postal Code

Phone _____ Email _____

Religious Institution

Name _____ Company _____

Address _____

Street

City

Province

Postal Code

Phone _____ Email _____

Statement of Wishes

for Funeral or Memorial Service

My pre-arrangements have been made with

Name of Funeral Home/Agency _____

Address _____

Street

City

Province

Country

Postal Code

Phone _____ Email _____

If you have not documented this information elsewhere or had a conversation with a family member or friend about your funeral wishes, please use this opportunity to list your specific information or instructions (For example, preferred clergy, special readings, hymns and music, preference for flowers or donations).

In lieu of flowers, donations made be made to

Charitable Organization _____

Address _____

Family and Friends

Who would you like specifically notified in the event of a health crisis or death?

Name _____

Address _____

Phone _____ Email _____

Name _____

Address _____

Phone _____ Email _____

Name _____

Address _____

Phone _____ Email _____

Name _____

Address _____

Phone _____ Email _____

Name _____

Address _____

Phone _____ Email _____

Ajax Pickering Hospital Foundation

Ajax Pickering Hospital Foundation is the only charitable foundation supporting acute and long-term care in west Durham.

Opened in 1954, the Ajax and Pickering General Hospital has a rich history of providing excellent health care to Ajax, Pickering and west Durham residents for over seven decades.

The Ajax Pickering Hospital Foundation was established in 1994 as a parallel foundation to benefit the Ajax Pickering Hospital.

Ajax Pickering Hospital Foundation works with the west Durham community to help save lives, restore health and provide compassionate care by raising funds that directly benefit patients at Ajax Pickering Hospital and the Jerry Coughlan Health & Wellness Centre, as well as the residents of Lakeridge Gardens Long-term Care Home.

The Ajax Pickering Hospital is one of four acute care sites that make up Lakeridge Health that serves people across Durham Region and beyond. Note that gifts to the Lakeridge Health Foundation **do not** support the Ajax Pickering Hospital; we have our own charitable foundation.

We Need Your Help

Without a doubt, everyone wants to lead productive and active lives with their families and in their community. When an unexpected illness or accident occurs, the doctors, nurses and health practitioners at the Ajax Pickering Hospital are ready to provide treatment, care and comfort.

As Ajax and Pickering continue to grow, the need to renew older equipment happens sooner than expected. New medical technologies, that offer more accurate and faster diagnosis/treatment, are important to purchase as it often means patients have better outcomes and shorter hospital stays. Most importantly, in offering new services and expanded care, patients can be treated closer to home, closer to family.

We need your help. Planned gifts give individual donors the chance to make a gift of a lifetime that will contribute toward improved patient care far into the future. Please consider including Ajax Pickering Hospital Foundation in your Will. Bequests can support the general needs of the hospital, a specific department or service, the Jerry Coughlan Health & Wellness Centre or Lakeridge Gardens Long-Term Care Home.

Booklet provided by:

Ajax Pickering Hospital Foundation

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www.aphfoundation.ca

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