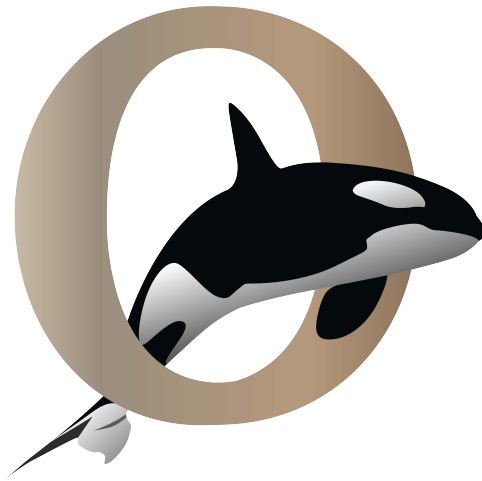


Welcome, you going to be astonished along the way



ORCA WEALTH

AND INSURANCE SERVICES

Since 1987

ESTATE DIRECTORY

This directory contains valuable estate information to assist in locating relatives, friends, advisors, assets and important personal papers.

COMPLETED BY

DATE

The Purpose of the Estate Directory

The Estate Directory is designed to help you organize critical personal information to be used at a time when it will be needed the most. Documenting this data now will prepare others to assist with your affairs in the event of a severe disability or death.

The Estate Directory will help you to quickly locate the important people in your life, as well as your important personal documents, at a time when things are very complicated.

The benefit of this type of advance planning is enormous, and people who might ordinarily be overlooked may be contacted immediately.

Please be accurate and thorough when completing these details. When the time comes to use this guide in assisting others with your affairs, you may not be able to provide any input.

This directory should be left with a person you trust, and its whereabouts should be identified on a card you carry with you at all times.

Please use a pencil.

In case of an emergency, the primary contacts are:

Full name of Key Personal Contact

Address

Phone (Res)

Phone (Bus)

Email

Full name of Key Financial Advisor

Address

Phone (Res)

Phone (Bus)

Email

Personal Information

Full Name		
<hr/>		
Birthdate		Birthplace
<hr/>		<hr/>
Social Insurance Number		
<hr/>		
Address (Res)		
<hr/>		
Employer Company Name		
<hr/>		
Address (Bus)		
<hr/>		
Phone (Res)		Phone (Bus)
<hr/>		<hr/>
Key Contact Person at Work		Title
<hr/>		<hr/>
Group Plan Number		
<hr/>		
<hr/>		
Spouse/Partner Full Name		
<hr/>		
Birthdate		Birthplace
<hr/>		<hr/>
Social Insurance Number		
<hr/>		
Address (Res)		
<hr/>		
Employer Company Name		
<hr/>		
Address (Bus)		
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Phone (Res)		Phone (Bus)
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Key Contact Person at Work		Title
<hr/>		<hr/>
Group Plan Number		
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Child's Name	Birthdate	Gender
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Child's Name	Birthdate	Gender
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Child's Name	Birthdate	Gender
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Relatives to Notify

Relatives will normally notify each other very quickly in the event of an emergency. Simply list the few key relatives from each side of the family who will automatically notify other relatives

Name	Relationship
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Address

Phone (Res)	Phone (Bus)
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Name	Relationship
------	--------------

Address

Phone (Res)	Phone (Bus)
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Name	Relationship
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Address

Phone (Res)	Phone (Bus)
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Name	Relationship
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Address

Phone (Res)	Phone (Bus)
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Name	Relationship
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Address

Phone (Res)	Phone (Bus)
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Name	Relationship
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Address

Phone (Res)	Phone (Bus)
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People to Notify

The following pages will take more time but are critical. List friends and acquaintances who are meaningful to you. Many of these people may otherwise be overlooked in the event of an emergency notification. Review your personal phone directories (club, place of worship, greeting card list, business and other records).

Name	Relationship
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Address _____

Phone (Res)	Phone (Bus)
1	1
2	2
3	3
4	4
5	5
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99	99
100	100

Name	Relationship
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Address _____

Phone (Res) Phone (Bus)

Name	Relationship
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Name	Relationship
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Name	Relationship
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Address _____

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100	100

Name	Relationship
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Address _____

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People to Notify (cont'd)

[illegible]

People to Notify (cont'd)

[illegible]

People to Notify (cont'd)

[illegible]

Advisors to Notify

Key Legal Advisor

Name	Firm
Address	
Phone	

Key Financial Advisor

Name	Firm
Address	
Phone	

Life Insurance Professional

Name	Firm
Address	
Phone	

Home and Auto Insurance Agent

Name	Firm
Address	
Phone	

Investment Advisor

Name	Firm
Address	
Phone	

Accounting/Tax Advisor

Name	Firm
Address	
Phone	

Bank Manager

Name	Firm
Address	
Phone	

Key People to Notify

Spiritual Advisor

Name	Firm
Address	
Phone	

Executor

Name	Firm
Address	
Phone	

Children's Guardian

Name	Firm
Address	
Phone	

Alternate Guardian

Name	Firm
Address	
Phone	

Doctor

Name	Firm
Address	
Phone	

Dentist

Name	Firm
Address	
Phone	

Additional Contact

Name	Firm
Address	
Phone	

Location of Documents

Filing systems for important documents and information are often designed to suit personal needs and are not necessarily clear to another person. We recommend you consolidate all documents into one place at each location. This will simplify the details for any person who is helping out on your behalf.

Documents in my home are located

Documents in my office are located

My safety deposit box is located (name and location)

Use one of the three locations detail above to identify the location of the following documents. "Other" might refer to a key person already listed on previous pages.

A - Home B - Office C - Safety Deposit Box D - Other

	A	B	C	D	
My Current Will Dated: ____/____/____ MM DD YY	____	____	____	____	_____
Spouse/Partner's Will: ____/____/____ MM DD YY	____	____	____	____	_____
Income Tax Returns	____	____	____	____	_____
Marriage documents	____	____	____	____	_____
Birth Certificates/citizenship papers	____	____	____	____	_____
Business Agreements	____	____	____	____	_____
Bank passbooks	____	____	____	____	_____
Investment certificates/stocks/bonds	____	____	____	____	_____
Deeds and other real estate documents	____	____	____	____	_____
Outstanding loan/creditor documents	____	____	____	____	_____
Funeral arrangements documents	____	____	____	____	_____
Life insurance policies	____	____	____	____	_____
All other insurance policies	____	____	____	____	_____
Credit Cards/personal valuables	____	____	____	____	_____