AGING WELL

CARE NAVIGATION LTD.

# Helping My Family Find What Matters

A family conversation about finances, records & access

Knowing where to look can make a difficult time feel more manageable. Complete this guide together, at your own pace, to help trusted people find important information if you need support or after your death.

Keep this guide private. Do not record passwords, PINs, recovery codes, security answers or full account numbers here. Use account nicknames or the last four digits only.

**My name**

**Last reviewed / updated**

## People who can help

**Trusted person to contact: name, relationship and phone**

**Lawyer / accountant / financial advisor: name and contact details**

## Important documents & instructions

**Where to find my will, financial planning documents and contact information**

**Who is named in my financial planning documents, and where copies are kept**

Finding an account does not itself give someone permission to use it. Ask the institution what authority and documents it requires before anyone acts on your behalf or for your estate.



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## Where I bank & keep financial accounts

**My name**

**Last reviewed / updated**

Suggestions to discuss: everyday banking, savings, investments, pensions, credit cards, loans and accounts held elsewhere. Choose what applies to you; use extra copies as needed.

### Account / institution 1

**Institution, branch / location and contact person (if known)**

**Account type / nickname / last 4 digits only**

**Account holder name(s)**

**Where statements or records can be found**

### Account / institution 2

**Institution, branch / location and contact person (if known)**

**Account type / nickname / last 4 digits only**

**Account holder name(s)**

**Where statements or records can be found**



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## Digital access, bills & practical next steps

**My name**

**Last reviewed / updated**

### Where secure access instructions are kept

Discuss your password manager, any emergency-access feature, and where separate secure instructions are stored. Include device and two-step verification arrangements without recording secret codes here.

**Location of secure instructions / password manager name / designated contact**

**Suggested topics: email, phone, computer, cloud storage and social media (no passwords)**

### Bills, subscriptions & other financial records

**Regular bills, automatic payments and subscriptions; where the full list is kept**

**Insurance, pensions, benefits, tax records or other accounts; where to find details**

### Our next steps

**What we still need to find, discuss or update**



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