



ROADMAP FOR YOUR EXECUTOR – Checklist

- **One statement from each bank account (chequing, savings, corporate)**
- **One statement regarding your RRSP's, RESP's, GIC's and other investments**
- **One statement for any stock trading account**
- **Copy of the title and mortgage to any real property you own**
- **Insurance Policies – life, property and vehicle**
- **One pension statement**
- **Copy of registration for any vehicles (as well as recreational vehicles)**
- **Loan documents (any currently outstanding loans)**
- **One Line of Credit statement**
- **One statement for each credit card (even if it is a \$0 balance)**
- **Evidence of ownership of Mineral Rights**
- **Evidence of ownership in any private or public corporations or partnerships (shares and assets)**
- **Evidence of a valuable club membership**

**** Ensure you update your documents as circumstances in your life change****

Phone: 403.887.0656

Fax: 403.887.0981

**Rouillard Law Office**
Barrister & Solicitor

*101, 37 Beju Industrial Drive
Sylvan Lake, AB
T4S 0K9*