

Because I Love You List

Short-term Help: _____

Longer-term Help: _____

SOP'S: _____

Passwords: _____

Keys: _____

Personal Trusted Advisor: _____

Mentor: _____

Professionals

Accountant: _____

Family Doctor: _____

Dentist: _____

Childcare Provider: _____

Counselor: _____

Financial advisor: _____

List of RRSP's, TFSA and other investments: _____

Lawyer: _____

Loaning Institutions/manager: _____

Insurance agents and policies: _____

Farm Operations

Processors (ie sales barns manager): _____

Elevator manager: _____

Commodity broker: _____

Suppliers: _____

Veterinarian: _____

Equipment: _____

Trusted realtor: _____

Association representative: _____

Vendor list (Do you have one to send out a blanket email?) _____

The Fix-It Folks

Mechanic: _____

Dealerships: _____

Electrician: _____

Plumber: _____

Furnace repairs: _____

Septic system/well & locations: _____

Equipment: _____

Welder: _____

Security systems: _____

Other stuff (Sleds, Pool, Camper, Snow removal):

Paper

Will(s): Where is a copy? Is it up to date? Reviewed in the last 5 years?

Power of attorney: _____

Executor: _____

Guardian: _____

Organ donation: _____

Cremation: _____

Funeral arrangements: _____

Business agreement(s): Where is a copy? Is it up to date?

Lease agreements: _____

Land (deeds): _____

Quota: _____

Houses: _____

Bank accounts: _____

Mortgages: _____

Vehicle ownership: _____

