My Personal Information Directory

Name(s)
Original Date

Last Update

The Purpose of a Personal Information Directory

The purpose of a Personal Information Directory is to organize and record personal information so that it will be readily available when need the most. The record will not only help you keep track of important information and documents, but will also assist other who become involved in your affairs in the event of disability or death. If kept up to date, this Personal Information Directory will ensure that many of your personal papers and records will be easily and quickly located when it becomes necessary to do so.

The benefits of providing this information can be enormous to those who care ab out you. Take time to complete this Directory accurately and thoroughly (this a a fillable PDF version, but on a printed version use pencil to allow for easy updating). Make sure that close family members always know where this record is stored.

BGC Stewardship Foundation provides assistance with estate planning and will preparation. This booklet is provided as a service to our clients and anyone else who is interested in using it to record vital personal information. Other information is available upon request from our National Office.

Contact:

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Fax: 780-435-2478 amaitland@shaw.ca

My Executor(s)

Name				
Address				
Phone	Email			
First <u>A</u> lte	nate or <u>C</u> o-Executor	○ A	Oc	
Name				
Address				
Phone	Email			
Second <u>A</u> l	ternate or <u>C</u> o-Executoi	•	OC	
Name				
Address				
Phone	Email			
My Last Will and Testament				
Location				
Date				
Codicil	OYes ONO If yes,	Date		
Originals	filed at:			



My Power of Attorney for Property

Name				
Address				
Phone		Email		
<u>A</u> lternate	or <u>C</u> o-Executoi	•	○ A	Oc
Name				
Address				
Phone		Email		
Originals	filed at:			
My Powe Name	er of Attorney	for Po	ersonal Care	2
Address				
Phone	1	Email		
Alternate or Co-Executor				
<u>A</u> lternate	or <u>C</u> o-Executoi	•	○ A	CC
<u>A</u> lternate Name	or <u>C</u> o-Executoi	•	○ A	CC
	or <u>C</u> o-Executoi	•	CA	○ C
Name		: Email	○ A	○ C
Name Address			CA	CC

Personal Information

Name				
Address				
Phone		Postal	Code	
DOB		Birth 1	Place	
Email				
Spouse's I	Name			
DOB		Birth	Place	
Email				
Children	:			
	Name	Phone	Email	
Business or Employer				
Address				
Phone		Postal	l Code	
Contact				
Phone		Email		

Location of Personal Documents

Birth Certificate				
Marriage Certificate				
Church Member Certificate				
Safety Deposit Box				
Box # Keys				
Health Insurance Card		#		
Social Insurance Card		#		
Prepaid Funeral Plans				
Income Tax Returns/Receipts				
Insurance Papers				
Pension/Annuity Records				
Loan/Mortgage Records				
Property Titles				
Medical/Dental Records				
Driver's License/Registration				
Passport				
Citations/Awards				
Divorce/Separation Agreement				
Powers of Attorney				
Other				

Financial / Insurance Records

Bank Accounts:		
Name of Financial Institution	Branch #	Account #
Certificates of Deposit		
RRSP:		
Name of Financial Institutio	n	Account #
TFSA:		
Name of Financial Institutio	n	Account #
Name of Financial Institution		Account #

Гуре	Account #	Advisor Name	Advisor Email/Pl
	_		
	e Policies:		
		Advisor Nome	Advison Emoil/Dl
Гуре	Toney #	Advisor Name	Advisor Email/Ph
	_		
	_		
odit Co	nds/Loons		
	rds/Loans:	Company	Account #
edit Ca Type	-	Company	Account #
	-	Company	Account #
	-	Company	Account #
	-	Company	Account #
	-	Company	Account #
	-	Company	Account #
	-	Company	Account #

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Online Accounts

URL/Account Name	User Name	Password

My Sources of Income

Source	Amount

Distribution of My Personal Belongings

In addition to the distribution of my assets as outlined in my will, I would like my family and my executor(s) to consider the following requests for the distribution of my personal belongings and household effect:

Item(s)	Entrusted to:
Other Requests / Inst	ructions

B.G.C. Stewardship Foundation

The BGC Stewardship Foundation was created by the Baptist General Conference of Canada for the purpose of managing the Investments that the BGCC owned. It progressed to being the arm through which Stewardship Education is promoted to individuals and to our churches. As a result, we have developed some of the following services:

BGCSF provides the following services:

Stewardship teaching - serve as a resource for worship services, Sunday school classes and other groups on a variety of stewardship-related topics.

Stewardship planning - assist individuals with wills and estate planning and tax/cash flow planning as it relates to their charitable intent.

Stewardship consulting - be available to work with our church boards, our district boards and our national board in helping expand income for ministry. BGCSF exists solely to support the ministry of the Baptist General Conference of Canada and its subsidiary ministries.

Canadian Baptist Seminary - The Foundation holds and manages an endowment fun for the seminary. It is the desire of the Foundation to expand this fund to enhance the Seminary's ministry.

This document created with the assistance of the

Abundance Canada WINNIPEG OFFICE

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