

# Because I Love You List

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It's hard to think about, but if you were to die suddenly, do your family and business partners have the critical information they need to move forward?

Create a "Because I love you" list by filling out the fields below. It will help you organize key personal and business information in one place and provide peace of mind when people need it most.

## **Business agreements**

Shareholder/Partnership/JV agreements (list them and where they're kept):

Lease agreements:

Land (deeds):

Employment contracts:

Quota:

Houses:

Bank accounts:

Mortgages:

Vehicles:

## **Professional**

Accountant:

Family doctors (GP, Eye, Dentist, etc.):

Childcare:

Family counselor:

Financial advisors:

Investments (RRSP's, TFSA, stocks & bonds, pension/profit-sharing plans, trusts, etc.):

Notes or mortgages receivable:

Safety deposit:

Lawyer:

Loaning institutions/managers:

Insurance agents and policies (disability, property and casualty, health, etc.):

## **Business operations**

Short-term help:

Long-term help:

Key passwords:

Physical keys:

Personal trusted advisor:

Mentor successors:

Processors (i.e. sales barns manager):

Elevator manager:

Commodity broker:

Suppliers:

Veterinarian:

Equipment:

Trusted realtor:

Association representative:

Vendor list (one to send out a blanket email):

Mechanic:

Dealerships:

Electrician:

Plumber:

Furnace/water softener:

Locations of septic systems, wells and underground lines:

Equipment repairs/dealer:

Welder:

Security systems:

Other stuff (sleds, pool, camper, snow removal):

## **Personal**

Will (where is it located and is it current?):

Medical records:

Power of Attorney/Living Will:

Executor:

Guardian:

Organ donation? Register at [beadonor.ca](http://beadonor.ca):

Blood type:

Cremation?

Funeral/burial arrangements/cemetery deeds: