

Client Number:

SKE#:

Date:

**PERSONAL AFFAIRS RECORD**

<b>Name - First:</b>		<b>Middle:</b>		<b>Last:</b>	
<b>Birth Date:</b>			<b>Place:</b>		
<b>Street/PO, City, Prov:</b>					<b>Post Code:</b>
<b>Email:</b>		<b>Phone:</b>		<b>Cell:</b>	
<b>SIN#:</b>	<b>SK Health:</b>		<b>Private Medical Ins:</b>		
<b>Occupation:</b>				<b>Work Place:</b>	
<b>Father's Name:</b>				<b>Birth Place:</b>	
<b>Mother's First &amp; Maiden Name:</b>				<b>Birth Place:</b>	

**SPOUSE –  Married or  Cohabiting for 2+ Years**

<b>Name - First:</b>		<b>Middle:</b>		<b>Last:</b>	
<b>Birth Date:</b>			<b>Place:</b>		
<b>Address: <input type="checkbox"/> same as above or:</b>					<b>Cell:</b>
<b>Address: <input type="checkbox"/> same as above or:</b>					<b>Email:</b>
<b>SIN#:</b>	<b>SK Health:</b>		<b>Private Medical Ins:</b>		
<b>Date of Marriage/Cohabiting:</b>				<b>Place of Marriage:</b>	
<b>Occupation:</b>				<b>Work Place:</b>	
<b>Father's Name:</b>				<b>Birth Place:</b>	
<b>Mother's First &amp; Maiden Name:</b>				<b>Birth Place:</b>	

**REGISTRY OF CHILDREN**

<b>Child 1 Name</b> (first, middle, last)	<input type="checkbox"/> Male <input type="checkbox"/> Female	<b>Birth Date:</b>	<input type="checkbox"/> Has child under 18 <b>Number of Children:</b>
Mailing Address	<b>Born to:</b> <input type="checkbox"/> Both <input type="checkbox"/> Wife <input type="checkbox"/> Husband	<b>Marital Status:</b>	<b>Comments</b> (eg. adopted):
<b>Child 2 Name</b> (first, middle, last)	<input type="checkbox"/> Male <input type="checkbox"/> Female	<b>Birth Date:</b>	<input type="checkbox"/> Has child under 18 <b>Number of Children:</b>
Mailing Address	<b>Born to:</b> <input type="checkbox"/> Both <input type="checkbox"/> Wife <input type="checkbox"/> Husband	<b>Marital Status:</b>	<b>Comments</b> (eg. adopted):
<b>Child 3 Name</b> (first, middle, last)	<input type="checkbox"/> Male <input type="checkbox"/> Female	<b>Birth Date:</b>	<input type="checkbox"/> Has child under 18 <b>Number of Children:</b>
Mailing Address	<b>Born to:</b> <input type="checkbox"/> Both <input type="checkbox"/> Wife <input type="checkbox"/> Husband	<b>Marital Status:</b>	<b>Comments</b> (eg. adopted):
<b>Child 4 Name</b> (first, middle, last)	<input type="checkbox"/> Male <input type="checkbox"/> Female	<b>Birth Date:</b>	<input type="checkbox"/> Has child under 18 <b>Number of Children:</b>
Mailing Address	<b>Born to:</b> <input type="checkbox"/> Both <input type="checkbox"/> Wife <input type="checkbox"/> Husband	<b>Marital Status:</b>	<b>Comments</b> (eg. adopted):
<b>Child 5 Name</b> (first, middle, last)	<input type="checkbox"/> Male <input type="checkbox"/> Female	<b>Birth Date:</b>	<input type="checkbox"/> Has child under 18 <b>Number of Children:</b>
Mailing Address	<b>Born to:</b> <input type="checkbox"/> Both <input type="checkbox"/> Wife <input type="checkbox"/> Husband	<b>Marital Status:</b>	<b>Comments</b> (eg. adopted):
<b>Child 6 Name</b> (first, middle, last)	<input type="checkbox"/> Male <input type="checkbox"/> Female	<b>Birth Date:</b>	<input type="checkbox"/> Has child under 18 <b>Number of Children:</b>
Mailing Address	<b>Born to:</b> <input type="checkbox"/> Both <input type="checkbox"/> Wife <input type="checkbox"/> Husband	<b>Marital Status:</b>	<b>Comments</b> (eg. adopted):

 The following children or grandchildren are disabled (indicate parent if grandchild): \_\_\_\_\_ Additional children are listed on a separate sheet or in the comments section on page 3.

**OTHER INFORMATION**

Income Tax Prepared by:	Self-Employed GST #:
Safety Deposit Box Location:	Box #:
Legal Documents held outside of MTL: <input type="checkbox"/> Power of Attorney <input type="checkbox"/> Will <input type="checkbox"/> Inter-Spousal Agreement <input type="checkbox"/> Corporate Documents held at:	

**NOTE:** Including the approximate values in the following sections aids in estate planning.

**RRSPS, RRIFs, TFSAS, ETC. (REGISTERED ACCOUNTS)**

Type	Institution	Account #	Owner(s)	Beneficiary	Amount

**BANK AND OTHER INVESTMENT ACCOUNTS (NON-REGISTERED)**

Type	Institution	Account #	Owner(s)	Amount

Additional Investment Information is attached

**LAND TITLES & LEASES**

Legal Description (if available)	Location of Property	Owner	Value

Additional Land Descriptions are attached

I am interested in more information about how a Mennonite Trust mortgage might save me money.

Current Mortgage Provider: \_\_\_\_\_ Current Balance: \_\_\_\_\_  
 Current Interest Rate: \_\_\_\_\_ Next Renewal Date: \_\_\_\_\_

**INSURANCE – LIFE, FUNERAL, DISABILITY, ETC...**

Life Insurance Company	Policy #	Beneficiary	Agent

**ADDITIONAL ASSETS – Vehicles, machinery and other items of substantial value**

Description	Owner(s)	Value

**DEBTS OWED TO ME – By children or others**

Name	Terms	Original Amount	Balance Remaining

**DEBTS I OWE – Mortgages, credit card, etc.**

Name & Description	Co-signed by:	Value

**ONLINE Presence**

I want this person to manage my internet accounts: \_\_\_\_\_

My passwords can be accessed here: \_\_\_\_\_

**COMMENTS** or other information:

**IMPORTANT INFORMATION**

***Unconfirmed Data***

Mennonite Trust Ltd. has not verified the accuracy of any of the information gathered by MTL or stored with MTL. It is the responsibility of the Executor to ensure that they have all relevant information. MTL has not confirmed the accuracy of any asset description contained in the Will.

***Mirror Image Wills***

A mirror image Will is when spouses make their Wills together. In these situations, there is an expectation that each spouse made their Will at least in part because of what the other spouse chose to put in their Will.

The Testators shall be aware of the following:

- 1) THAT Mennonite Trust Ltd. is acting jointly when preparing the mirror image Wills.
- 2) THAT the information between the Testators is not confidential and, in the future, should conflict arise between the Testators, Mennonite Trust Ltd. has the right to advise the other spouse.
- 3) THAT in the event of the death of one spouse it may be that the surviving spouse may want to change his or her Will.

OFFICE USE:  P  A  C  O