

Worksheet 10

Your summary checklist

I have completed all the following documents:

- A family portrait of my relative.
- My letter to the future, clarifying my wishes.
- A list of my relative's documents: birth certificate, social insurance card, health care card, etc.
- An up-to-date Will that reflects my current wishes.
- A description of the purpose of the trust.
- An up-to-date list of my major assets and where they are kept (insurance policies, bank accounts, stocks, mutual funds, and so on).

and

- I have stored all these documents in a safe place.
- My executor knows where these documents are kept.

