



Legacy / Planned Giving Personal Information Booklet

A guide to assist you in compiling
and documenting personal
and estate information

We are very pleased to present this *Personal Information Booklet*. **Let's Talk Science** has designed this tool as a vital part of your estate planning process. This booklet will assist you in documenting information about all aspects of your estate plan, including all legal and financial matters and provide a simple tool to convey this essential personal information to those who need to know. While it contains critical information, it is not a legal document and should not be a substitute for a Will or an estate plan. Please consult your professional advisor during the estate planning process.



You may want to make a copy of this booklet for your family, friends and all others who will require this information in order to settle your estate.

Thank you for being a friend of Let's Talk Science.



Let's Talk Science is committed to preparing youth in Canada for future careers and citizenship demands in a rapidly changing world.



Being Prepared

Family and friends face many difficult issues when a loved one dies, including making funeral arrangements, carrying out the estate plan and dealing with legal and financial matters. This booklet, which allows you to include details about your personal and financial affairs in one place, is one of the most caring gifts you can leave to your family.

Let's Talk Science has prepared and designed this booklet to assist you with providing vital information your family will need to carry out your wishes.

Your Estate Plan

Everyone needs a Will, regardless of the size and complexity of their assets. Should you die without a Will, the government will determine what happens to your assets. Preparing a legal Will ensures that your estate and possessions will be distributed exactly as you wish after your death, ensuring that your legacy is preserved exactly as you intended.

We're Here to Help

In addition to providing you with this booklet as a valuable resource in your planning process, at Let's Talk Science we can also provide you with assistance on:

- ✓ How to include **Let's Talk Science** in your Will; and
- ✓ How to leave a gift to **Let's Talk Science** that will preserve your legacy in perpetuity.

Personal Information

Full Legal Name: _____

Name at Birth (if different from above): _____

Address: _____

City/Town: _____ Province: _____ Postal Code: _____

Social Insurance Number: _____

Home Telephone Number: _____

Place of Birth: _____
City Province/State Country

Date of Birth: _____
Month Day Year

Citizenship: _____

Father's Name: _____ Mother's Maiden Name: _____

Marital Status: Married Never Married Divorced Separated Widowed

Spouse's Name: _____

Date of Marriage: _____ / _____ / _____ Place of Marriage: _____
Month Day Year City Country

Next of Kin

Name	Relationship	City of Residence	Phone Number
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Financial Information

Bank Accounts

Chequing Account(s): _____
Institution Account Number(s)

Savings Account(s): _____
Institution Account Number(s)

Other Account(s): _____
Institution Account Number(s)

Brokerage Account(s): _____
Institution Account Number(s)

Credit Cards

Type of Card Card Number

Type of Card Card Number

Type of Card Card Number

Income Sources

Canada Pension Plan: YES NO Old Age Security/GIS: YES NO

Other Pension or Annuity Income

Income Source Monthly Amount

Income Source Monthly Amount

Mortgage Information:

Institution Mortgage Number

RSP/RIF Information

Institution	Account Number
Institution	Account Number
Institution	Account Number

Insurance Policy Information

Institution	Policy Number
Institution	Policy Number
Institution	Policy Number

Safety Deposit Box Information

Institution and Address	Box Number
Key Number	Key Location
Persons Having Access	Phone Number(s)

Other Financial Assets

Canada Savings Bonds, GICs, CDs, etc.

Description	Location	Asset Number
Description	Location	Asset Number
Description	Location	Asset Number
Description	Location	Asset Number

Employment History

Present (or Former) Employer: _____

Address of Employer: _____

Date of Retirement (if applicable): _____

Month

Year

Pension Benefits: YES NO

Member of a Labour Union: YES NO

Name and Address of Local: _____

Name

Address

Other Assets

Automobile(s)

Make	Year	Lease/Own
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Make	Year	Lease/Own
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Real Estate/Property

Property #1

Address	City
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Property Description	Sole Owner/Co-owner
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Property #2

Address	City
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Property Description	Sole Owner/Co-owner
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Other Assets

Asset	Description
Asset	Description
Asset	Description
Asset	Description
Asset	Description
Asset	Description
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Insurance Information

Medical/Healthcare

Provincial / Territorial Healthcare Insurance: _____

Supplementary Medical Insurance: _____
Name Address

Other Medical Insurance: _____

Life Insurance

Insurance Company: _____ Policy Number: _____

Agent: _____ Phone Number: _____

Insurance Company: _____ Policy Number: _____

Agent: _____ Phone Number: _____

Insurance Company: _____ Policy Number: _____

Agent: _____ Phone Number: _____

Automobile Insurance

Insurance Company: _____ Policy Number: _____

Agent: _____ Phone Number: _____

Property Insurance

Insurance Company: _____ Policy Number: _____

Agent: _____ Phone Number: _____

Estate Planning Information

Solicitor

Name	Address
City	Phone Number

Financial Advisor

Name	Address
City	Phone Number

Executor #1

Name	Address
City	Phone Number

Executor #2

Name	Address
City	Phone Number

Executor #3

Name	Address
City	Phone Number

Last Will and Testament

Date of Will: _____ Date of Codicil _____

Location of Original Copy: _____

Additional Copies with: _____

Estate Settlement Information

Accountant

Name	Address
City	Phone Number

Banker/Financial Representative

Name	Address
City	Phone Number

Broker

Name	Address
City	Phone Number

Physician

Name	Address
City	Phone Number

Funeral Home/Agency

Name	Address
City	Phone Number

Religious Institution

Name	Address
City	Phone Number

Estate Settlement Information (cont'd)

Power of Attorney for Property

Name	Address
City	Phone Number

Power of Attorney for Property

Name	Address
City	Phone Number

Power of Attorney for Personal Care

Name	Address
City	Phone Number

Power of Attorney for Personal Care

Name	Address
City	Phone Number

Organ Donor YES NO

Statement of Wishes for Funeral or Memorial Service

My Pre-arrangements have been made with:

Name of Funeral Home	Address
City	Phone Number

If you have not documented this information elsewhere or had a conversation with a family member or friend about your funeral wishes, please use this opportunity to list your specific information or instructions (For example, preferred clergy, special readings, hymns and music, preference for flowers or donations).

In lieu of flowers, donations may be made to:

Name of Charitable Organization	Address	City
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Name of Charitable Organization	Address	City
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Other Family and Friends

List those family members and friends that you would like to ensure are made aware of your funeral / memorial. Use the Notes section to list individuals that you would like to provide a special reading, tribute, poem, song, etc.

Name	Address	Phone Number
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Name	Address	Phone Number
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Name	Address	Phone Number
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Name	Address	Phone Number
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Name	Address	Phone Number
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Name	Address	Phone Number
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Name	Address	Phone Number
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Name	Address	Phone Number
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Notes:

Let's Talk Science Builds Skills for Life

Our world is rapidly changing and youth in Canada need to be curious, ask questions and be capable of challenging the status quo in order to succeed. In a world increasingly driven by innovation, the demand for people who can fill science, technology, engineering and mathematics (STEM) - related jobs will only continue to increase but the reality is that most students disengage from STEM courses before graduating high school.

About Let's Talk Science

Let's Talk Science is an award-winning, national, charitable organization focused on education and outreach to support youth development. Let's Talk Science creates and delivers unique learning programs and services that engage children, youth and educators in science, technology, engineering and math (STEM) to support learning and skill development. The programs, resources and services, motivates and empowers children and youth in Canada to fulfill their potential and prepare for their future careers and roles as citizens. Let's Talk Science has excited, inspired and engaged more than 9.5 million children, youth, educators and volunteers in STEM since its inception.

Every donation makes a difference and allows us to continue the work we are doing – impacting youth in Canada and setting them up for success.



For more information on making a gift of STEM learning to support children, youth, educators and volunteers in Canada, contact us at donate@letstalkscience.ca or visit <https://letstalkscience.ca/our-supporters/legacy-giving>.

Charitable registration number: 88540 0846 RR001

