Your Financial Tool Kit

Developed by the Financial Consumer Agency of Canada, the Investor Education Fund and l'Autorité des marchés financiers

Estate planning checklist

Review the tips below. Decide if each one is suitable for you or not, if you plan to do it, or if you need to look into it more. Mark each one in the appropriate column.

Item	Done	Will do	Will look into it	Not for me
Leave a will	○	○	○	○
Name beneficiaries in insurance and other policies	○	○	○	○
Plan your funeral	○	○	○	○
Prepay your funeral	○	○	○	○
Buy life insurance to cover expenses	○	○	○	○
Give gifts before death	○	○	○	○
Spend unsheltered assets first	○	○	○	○
Use final RRSP contributions	○	○	○	○
Buy permanent life insurance as an investment	○	○	○	○
Transfer property to joint ownership	○	○	○	○
Set up a trust fund(s)	○	○	○	○
Make arrangements in case of incapacity	○	○	○	○