



Real Estate

House

Appropriate? ☐ Yes ☐ No

Address: _____

Location of keys: _____

Date purchased: _____

Cost on purchase: _____

BC property assessment value: _____

Date of assessment: _____

Annual property tax: _____

Alarm code to enter home: _____

Alarm company: _____ Password: _____

How title is registered _____

☐ Alone ☐ Joint tenants with survivorship ☐ Tenants in common

☐ Partnership ☐ Through corporation ☐ Other: _____

Improvements made, the date they were made, and their cost: _____



Heritage
Trust

Mortgage(s) with: _____

Approximate balance owed: _____

Is the mortgage life-insured? ☐ Yes ☐ No

Terms of mortgage: _____

Condo

Appropriate? ☐ Yes ☐ No

Address: _____

Location of keys: _____

Date purchased: _____

How title is registered: _____

Cost on purchase: _____

Improvements made, the date they were made, and their cost: _____

How fees are paid: _____



Where Condo rules and bylaws are located: _____

Cottage

Appropriate? ☐ Yes ☐ No

Address: _____

Location of keys: _____

Date purchased: _____

How title is registered: _____

Cost on purchase: _____

Improvements made, the date they were made, and their cost: _____

Other Real Estate

Appropriate? ☐ Yes ☐ No

Address: _____

Location of keys: _____

Date purchased: _____

How title is registered: _____

Cost on purchase: _____

Improvements made, the date they were made, and their cost: _____



Heritage
Trust

Appropriate? ☐ Yes ☐ No

Address: _____

Location of keys: _____

Date Leased: _____

Name on Lease: _____

Location of Lease: _____

Term of Lease and Financial Information: _____



Utility information

For each property as applicable

Water Company

Name: _____ Phone: _____ Acct. No.: _____

Electricity Company

Name: _____ Phone: _____ Acct. No.: _____

Gas or Oil Company

Name: _____ Phone: _____ Acct. No.: _____

Telephone Company

Name: _____ Phone: _____ Acct. No.: _____

Internet Provider

Name: _____ Phone: _____ Acct. No.: _____

Cable Provider

Name: _____ Phone: _____ Acct. No.: _____

Other

Name: _____ Phone: _____ Acct. No.: _____

Other

Name: _____ Phone: _____ Acct. No.: _____

Other

Name: _____ Phone: _____ Acct. No.: _____

Other

Name: _____ Phone: _____ Acct. No.: _____

Other

Name: _____ Phone: _____ Acct. No.: _____



Personal Property

Vehicle

Appropriate? ☐ Yes ☐ No

Make/model/year: _____

Cost and date acquired: _____

Do you lease or own the vehicle? ☐ Lease ☐ Own

Make/model/year: _____

Cost and date acquired: _____

Do you lease or own the vehicle? ☐ Lease ☐ Own

Jewelry

Appropriate? ☐ Yes ☐ No

Description: _____

Cost and date acquired: _____

Description: _____

Cost and date acquired: _____

Description: _____

Cost and date acquired: _____

Description: _____

Cost and date acquired: _____

Description: _____

Cost and date acquired: _____

Description: _____

Cost and date acquired: _____

Description: _____

Cost and date acquired: _____

Description: _____

Cost and date acquired: _____

Artwork

Appropriate? ☐ Yes ☐ No

Description: _____

Cost: _____

Description: _____

Cost: _____

Description: _____

Cost: _____

Description: _____

Cost: _____

Other Personal Property

(E.g., a stamp or coin collection)

Description: _____

Cost: _____

Description: _____

Cost: _____

Description: _____

Cost: _____

Description: _____

Cost: _____

Description: _____

Cost: _____



Description: _____

Cost: _____

Description: _____

Cost: _____

Description: _____

Cost: _____

Description: _____

Cost: _____

Description: _____

Cost: _____

Description: _____

Cost: _____

Safe Deposit Box

Appropriate? ☐ Yes ☐ No

Location: _____

Number: _____

Where key is kept: _____

Who else has access: _____

List of contents: _____



Storage Locker

Appropriate? ☐ Yes ☐ No

Description: _____

Location of storage: _____

Location of key: _____

Combination of lock: _____

Other individuals with access: _____

Safe

Appropriate? ☐ Yes ☐ No

Description: _____



Heritage
Trust

Location of safe: _____

Location of key: _____

Combination of lock: _____

Other individuals with access: _____