BluestoneFinancial
Terry and Patty Rempel

Estate Plan

Name | Date

1. Support Team

Financial Advisor	
Accountant	
Lawyer	
Power of Attorney for Property	
Power of Attorney for Personal Care	
Estate Trustee	

2. Will

Date Last Will & Location	
Beneficiaries	
Special Bequests	
Estate Equalization	

3. Taxation

RRSP/RRIF	
Unrealized Capital Gains	

4. Probate Fees

TFSA beneficiaries	
RRSP beneficiaries	
Joint Ownership	

5. Trust(s)

6. Record of Personal Affairs

Completed	
Stored	
Shared	

7. Charitable Donations & Gifts

8. Funeral Arrangements

9. Estate Cash

Notes: