

The Executor Kit

The person who agrees to be the executor of your estate is making a huge commitment. Whether you select a relative, a friend or a professional advisor, you're asking your executor to take on one of life's most important responsibilities. With The Executor Kit™ from Serenity, you can do your part by making the job as easy and painless as possible.



A place for everything you need to share.

The Executor Kit is a ready-to-use tool that helps you gather all of the information your executor will need in one convenient binder system. Although we've designed the kit for people to provide to their executors in advance, it's also a valuable tool for new executors who are endeavouring to fulfill their duties, saving them time and money.

A central repository at the executor's fingertips.

The Executor Kit serves as a reminder of all the information your executor will need—and a convenient system for storing all of the required information you gather. Instead of rummaging through your belongings and personal papers, your executor will have everything at hand and ready to use. The convenient forms give you a place to capture information, and the ringed binder makes it easy to insert copies of important documents.

The most important gift you can give your executor.

The Executor Kit will make your executor's job easier, help you remember things you need to say and convey, and ensure that your wishes are made clear.

Your executor has given you an amazing gift by saying yes. Return the favour with a completed Executor Kit.

The Executor Kit comes complete:

- Binder and case
- All required forms
- Detailed instructions
- CD with all forms make updating easy

\$185. plus tax



The Executor Kit[™]
A SERENITY EXCLUSIVE

Categories that capture what matters most

We've organized The Executor Kit into nine tabbed sections you'll use to gather and complete information for your executor:

Household. Information about how you run your home, from cable and telephone accounts to subscriptions and contact information for handymen, sitters and other service providers.

Banking. Information about where you bank, including account numbers, automatic debits and deposits, loans and safety deposit boxes.

Income. Information about income, including employment, pensions and other sources.
Insurance. Information about your policies, including vehicle, home, disability, life and health.

Investments. Information about retirement savings plans, stocks, guaranteed investment certificates, education savings plans and other investments.

Property. Information about things you own, from your home and vehicles to jewelry, artwork, collectibles, heirlooms and more.

Important documents. Originals or copies of key documents—from your will, birth certificate, marriage license and passport to powers of attorney, divorce papers, military records, immigration papers, religious documents and more.

Government information/taxes. Information about your Canada Pension Plan, Old Age Security, other government pension or health plans, tax returns, death benefits and more.

Completion. Contact lists, information about your business, lawyer, doctor, dentist and other service providers, funeral arrangements and wishes, special messages to family, friends and colleagues, and more. and wishes, special messages to family, friends and colleagues, and more.

Only available at:

Serenity Preplanning Center

www.preplanyourfuneral.ca — 780-988-2929

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prepared