



*Dreams cost nothing...  
Implementation gets expensive.*

## Personal Finance Package

*Prepared for:*

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Date: \_\_\_\_\_

The views and opinions expressed in this essay are solely my personal views and opinions based upon my personal experiences, and do not represent the views or opinions of my employer.

## Outline

- > Contact Names
- > Personal Information
- > Legal Documents
- > Banking Information
- > Insurance Policies
- > Investment Accounts
- > Real Estate

## Contact Names

Responsibility	Contact	Phone Number	Email
Accountant			
Bank Manager			
Employer			
Executor(s)			
Guardian(s)			
Disability Insurance			
Property Insurance			
Life Insurance			
Investment Advisor			
Lawyer			
Family			
Family			
Family			

## Personal Information

Name	Date of Birth	SIN	OHIP	Driver's License

Name	Birth Certificate	Credit Card	Credit Card	Passport

## Legal Documents

Document	Yes / No	Contact	Location
Loan			
Mortgage			
Power of Attorney for Property			
Power of Attorney for Personal Care			
Trust Agreement			
Will			

**Banking Information**

Document	Company	Contact	Account Number
Bank - Account			
Bank - Account			
Bank - Loan			
Bank - Mortgage			
Bank - Safety Deposit Box			

**Insurance Policies**

Asset	Company	Contact	Policy Number
Life Insurance			
Life Insurance			
Life Insurance			
Life Insurance			
Disability Insurance			
Property Insurance			

**Investment Accounts**

<b>Asset</b>	<b>Company</b>	<b>Contact</b>	<b>Account Number</b>
Registered Account			
Registered Account			
Registered Account			
Registered Account			
Non Registered Account			
Non Registered Account			
Non Registered Account			
Tax Free Savings Account			

**Real Estate**

<b>Residence</b>	<b>Tax Roll Number</b>	<b>Hydro Account</b>	<b>Energy Account</b>
House			
Second Property			

**Note**

This material is extremely confidential and I recommend you store it in a safe place, preferably your safety deposit box.

## About the Author



Bob Livingston has spent over 40 years on Bay Street, on both the sell-side and buy-side. In the last 15 years he has made numerous presentations on wealth management and has spoken at several conferences on the part philanthropy can play in managing your wealth. In addition to Bob's financial management experience, he has become very interested in personal development. He has made numerous presentations to high school and university students, stressing the importance of wealth management and personal development.

Bob has written numerous essays on family issues, personal development, philanthropy, and wealth management. Two common themes in his essays are the importance of developing financial responsibility in your life as well as increasing personal involvement in your community. These goals can be realized by learning the basics of wealth management and making personal development an integral part of your operating DNA. Bob uses numerous family anecdotes to illustrate his personal journey in pursuit of these two goals.

When asked why he has such a passion for personal development, Bob's answer is simple: "It is my way of giving back to the community, it expands my comfort zone, and most importantly, I am having fun doing it." Bob has come to realize one of his true passions in life is helping others achieve their dreams.

Bob has developed a website, [dreamscostnothing.com](http://dreamscostnothing.com), where you can access his reflections on family issues, personal development, philanthropy, and wealth management. There is also resource material available regarding specific topics like organizing your financial documents and starting a personal development library.

Bob suggests that you never forget: "Dreams cost nothing. Implementation gets expensive."

## Contact Information

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