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Worksheet 11

Your summary checklist

I have completed all the following documents:

- ☐ A family portrait of my family member.
 - ☐ My letter to the future, clarifying my wishes.
 - ☐ A list of my family member's documents: birth certificate, social insurance card, health care card, etc.
 - ☐ An up-to-date Will that reflects my current wishes.
 - ☐ A description of the purpose of the discretionary trust.
 - ☐ An up-to-date list of my major assets and where they are kept (insurance policies, bank accounts, stocks, mutual funds, and so on).
- and
- ☐ I have stored all these documents in a safe place.
 - ☐ My executor knows where these documents are kept.