

Retirement Information Locator

Use your updated Retirement Information Locator to organize your retirement and financial documents:

1. Write down the location of your important records in the spaces provided.
2. Keep this sheet available so you and your family can have easy access to your documents.
3. In addition to your retirement records, make sure to keep your CAAT Pension Plan documents in a safe location - Member newsletters are important sources of plan information.

CAAT PENSION PLAN DOCUMENTS

Location

Member's Annual Pension Statements
Member Newsletters
Member Handbook
Other CAAT Pension Plan documents

Missing any CAAT Pension Plan documents? Contact the CAAT Pension Plan at 416-673-9000 to get copies.

RETIREMENT DOCUMENTS

Location

Canada Pension Plan Statements
RRSP Non Locked-In
RRIF
Locked-In Retirement Income Fund
Reverse Mortgage
RRSP Locked-In
Life Income Fund
Annuities
Other employer pension
Other Retirement documents

ESTATE DOCUMENTS

Location

My will (original)
My spouse's will (original)
Special bequests
College life insurance
Other death benefits
Accidental Death & Dismemberment
My will (copy)
My spouse's will (copy)
Funeral instructions
Term life insurance
Whole life insurance
Other Estate documents

PERSONAL DOCUMENTS

Location

Birth certificates
Passports
Marriage certificate
Children's birth certificates
Divorce/separation papers
Other Personal documents

RETIREMENT INFORMATION LOCATOR

FINANCIAL DOCUMENTS

Location

List of chequing/savings accounts
Bank statements, cancelled cheques
List of credit cards
Certificates of deposits
Chequebooks/savings books
Safety Deposit Box key
List of Canada Savings Bonds
Record of investment securities
Brokerage account records
Stock Certificates
List of mutual fund shares
Income tax returns
Other Financial documents

HEALTH-RELATED DOCUMENTS

Location

Living wills (original)
Living wills (copy)
Long term care insurance
Disability insurance
Extended health care
Power of attorney/property
Power of attorney/personal care
Critical illness insurance
Other Health-related documents

PROPERTY-RELATED DOCUMENTS

Location

Titles and deeds to real estate and land
Rental property records
Other loan agreements
Rental/lease agreements
Property/casualty insurance
Homeowners insurance
Car insurance
Car ownership records
Other Property-related documents

OTHER DOCUMENTS

Location
