



Resource: My Planning Snapshot

A simple one-page summary your family can use in a stressful moment.

My information

Name: _____ DOB: _____
Address: _____
Phone: _____ Email: _____
Alberta Health Care #: _____ Driver's License #: _____

Key people

Executor/personal representative: _____ Phone: _____
Alternate: _____ Phone: _____
Enduring Power of Attorney (EPOA): _____ Phone: _____
Emergency contact: _____ Phone: _____

Where to find things

Will / EPOA / Personal Directive location: _____
Insurance info: _____ Bank info: _____
Passwords / digital access instructions are stored: _____
Other important paperwork: _____

My wishes (keep it simple)

If I'm seriously ill, what matters most is: _____
My funeral/memorial preferences are recorded: Yes Not yet
I have pre-purchased funeral arrangements in place: Yes Not yet
Where they are recorded: CMS profile Ducks in a Row Other: _____

CMS (if applicable)

CMS Member name/number (if known): _____
My family knows I'm a CMS member: _____

Date completed: ____ / ____ / ____