

Many of us have our own method for storing important financial records and documents. However, if someone else were to step into your shoes, would they be able to locate this information?

The **BMO Nesbitt Burns Estate Information Organizer** can be used to capture the location of important documents and other information, making it a valuable resource for you, your family, executor or Power of Attorney for Property.

You can choose to print and complete the Estate Information Organizer by hand, or enter information directly into the PDF file. Simply use this [link](#) to download and get started. Because of the personal and confidential nature of the information captured, we recommend that the information be kept in a secure, but accessible, location. It is a practical document, so feel free to share this email with friends or family members.

As always, if you have questions, please call us.

Sincerely,

[The Ferrie Wealth Management Group](#)

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