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INFORMATION REQUIRED TO PREPARE YOUR WILL

A. FAMILY AND PERSONAL INFORMATION

1. Family Particulars

Full Name

First Middle Last (Maiden or other name used)

Address

Street / Rural Route City / Township

Province Postal Code

Telephone _____
Home Office

Date of Birth _____ S.I.N. _____

Occupation _____ Present Employer _____

Marital Status _____ Domicile (your permanent home) _____

Date of Marriage _____ Place of Marriage _____

Date of Divorce _____ Place of Divorce _____
(if applicable) (If applicable)

Is will being made in contemplation of Marriage _____

Full Name of Spouse

First Middle Last (Maiden or other name used)

Address of Spouse
(if different from above)

Street / Rural Route City / Township

Province Postal Code

Date of birth of Spouse _____ S.I.N. of Spouse _____

Occupation of Spouse _____ Present Employer _____

Are you presently living with your Spouse? _____

Date of Divorce of Spouse from previous marriage (If applicable)

Place of Divorce of Spouse from previous marriage

Children and / or relatives to inherit under will.

NAME	RELATIONSHIP	DATE OF BIRTH	ADDRESS
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

In most provinces across Canada, legislation has been passed stating that illegitimate children of any relationship are now included in the definition of “children” and “issue” in relation to distribution on death, requiring the personal representative to make enquiries concerning the possibility of illegitimate children existing, unless the presumption concerning illegitimate children is excluded in the will.

Do you wish to exclude illegitimate children of either yourself or your offspring

Details of domestic contracts of community of property (i.e. Quebec).

Details of support obligations, either moral or legal.

Details of any relevant personal situations, such as disabled or spendthrift Spouse or Children

2. COUNSELORS

Minister _____
Full Name Address

Lawyer _____
Full Name Address

Accountant _____
Full Name Address

Insurance Agent _____
Full Name Address

Financial Advisor _____
Full Name Address

Broker _____
Full Name Address

3. LOCATION OF IMPORTANT PAPERS

Current Will _____

Life Insurance Policy _____

Funeral or Burial
Property Deed _____

Securities and
Property Deeds _____

Automobile
Registration _____

Marriage Certificate _____

Tax Records _____

Birth Certificate _____

Passport _____

Safety Deposit Box
(Location and No..) _____

List of Credit Card

Numbers _____

Trust Agreements _____

Business Agreements _____

Other _____

B. INVENTORY OF ESTATE

1. REAL ESTATE (indicate which is principal residence)

Location & Type	Sole / Joint Ownership	Current Value (do not deduct mortgage)	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____
_____		\$ _____	\$ _____	\$ _____

2. HOUSEHOLD GOODS & FURNITURE

Description	Sole / Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

3. HEIRLOOMS, ARTWORK, JEWELLERY AND COLLECTION

Description	Sole / Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

4. AUTOMOBILES, BOATS & RECREATION VEHICLES

Description	Sole / Joint Ownership	Current Value	Husband's Share	Wife's Share
		\$ _____	\$ _____	\$ _____
		\$ _____	\$ _____	\$ _____
		\$ _____	\$ _____	\$ _____
		\$ _____	\$ _____	\$ _____

5. FARM MACHINERY, TOOLS, LIVESTOCK AND QUOTAS

Description	Sole / Joint Ownership	Current Value	Husband's Share	Wife's Share
		\$ _____	\$ _____	\$ _____

6. CASH DEPOSITS

Bank	Account	Sole / Joint Ownership	Husband's Share	Wife's Share
			\$ _____	\$ _____
			\$ _____	\$ _____
			\$ _____	\$ _____

7. STOCKS (Publicly Traded)

Description	Sole / Joint Ownership	Current Value	Husband's Share	Wife's Share
		\$ _____	\$ _____	\$ _____
		\$ _____	\$ _____	\$ _____

8. BONDS AND INVESTMENT CERTIFICATES

Description	Sole / Joint Ownership	Current Value	Husband's Share	Wife's Share
		\$ _____	\$ _____	\$ _____
		\$ _____	\$ _____	\$ _____

9. MONEY INVESTED IN MORTGAGES AND PERSONAL LOANS

	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

10. INSURANCE

Name of Company	Type	Beneficiary	Husband's Share	Wife's Share
			\$	\$

11. R.R.S.P.'S COMPANY PENSION PLANS

Name of Company	Type	Beneficiary	Husband's Share	Wife's Share
			\$	\$
			\$	\$

12. BUSINESS & PARTNERSHIP INTERESTS

Name & Nature of Business	Sole Proprietorship or Partnership	Current Value	Husband's Share	Wife's Share
		\$	\$	\$

Details of Shareholders and/or Partnership Agreements _____

13. TRUST FUNDS THAT YOU ARE BENEFICIARY OF

Source	Purpose	Your Rights to Trust Fund	Husband's Share	Wife's Share
			\$	\$

14. TRUST FUNDS THAT YOU ARE TRUSTEE FOR

Nature of Trust	Beneficiary	Description of Property

These funds are not included in the value of your estate.

15. OTHER ASSETS

Description	Sole / Joint Ownership	Current Value	Husband's Share	Wife's Share
		\$ _____	\$ _____	\$ _____

TOTAL VALUE OF ASSETS:

\$ _____ \$ _____

16. APPROXIMATE DEBTS & MORTGAGES OUTSTANDING

Nature of Debt & Security Given	Name & Address Mortgagor or Creditor	Joint/ Sole Debt	Amount	Husband's Share	Wife's Share
			\$ _____	\$ _____	\$ _____

TOTAL AMOUNT OF DEBTS \$ _____ \$ _____

TOTAL NET VALUE OF ESTATE \$ _____ \$ _____

C. NAMING OF EXECUTOR/EXECUTRIX

Do you want your spouse as executor/executrix if she / he survives? If not, who is to act as executor(s) or executrix(s)?

NAME	ADDRESS	RELATIONSHIP (IF ANY)
_____	_____	_____
_____	_____	_____
_____	_____	_____

Who is to act as alternative executor(s) or executrix(s)?

NAME	ADDRESS	RELATIONSHIP (IF ANY)
_____	_____	_____
_____	_____	_____
_____	_____	_____

In the case of two executor(s) or executrix(s) is one to have the deciding vote?

In the case of three or more executor(s) or executrix(s), is a majority decision binding?

Are there any special instructions to the executor(s) or executrix(s), such as physical custody of assets, etc. _____

Instructions from Spouse, if different from above. _____

D. NAMING OF GUARDIAN FOR CHILDREN

Name of Guardian(s)

First	Middle	Last	Address
_____	_____	_____	_____

First	Middle	Last	Address
_____	_____	_____	_____

Alternative Guardian(s)

First	Middle	Last	Address
_____	_____	_____	_____

First	Middle	Last	Address
_____	_____	_____	_____

Name of Guardian(s)

First	Middle	Last	Address
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E. FUNERAL INSTRUCTIONS

Any funeral instructions included in your will should be conveyed to your executrix or executrix now.

Instructions from Spouse, if different from above.

F. DISTRIBUTION OF ESTATE

1. PERSONAL EFFECTS (i.e. jewellery, clothing, keepsakes, etc.)

If Spouse survives, are all personal effects to go to Him/Her?

If answer is NO, or Spouse does not survive for thirty days, how is personal property to be distributed?

1) To personal representative with request that personal property be distributed according to his/her discretion. _____

2) In accordance with a non-binding letter of instructions filed with your will. _____

3) In accordance with a non-binding memorandum accompanying your will. _____

4) To living Children as they may agree. _____

5) Other (please specify details). _____

Instructions from Spouse if different. _____

2. LEGACIES (MONEY) AND/OR SPECIFIC GIFTS (including Real Property)

Name of Person/Organization
as beneficiary

Money/Property
To be given

Alternative
Beneficiary

Instructions from Spouse, if different from above.

3. DISPOSITION OF INSURANCE, R.R.S.P., R.H.O.S.P., etc. (if different from instructions in policies)

Policy or Plan

Beneficiary

4. DISPOSITION OF BUSINESS OR PARTNERSHIP INTEREST

Is there need for specific property to be held in trust, such as a house?

If so, then specify the following:

Trust Property _____

Beneficiary _____

Cost of Care of Trust Property _____

Termination of Trust _____

Instructions from Spouse, if different from above _____

5. RESIDUE

A) If married (with or without children) and Spouse survives for a minimum of 30 days, then:

- all to Spouse? _____

- if not, then:

_____ % to surviving Spouse _____

_____ % to each surviving child _____

_____ % to other _____

_____ % to charities _____

B) If predeceased by Spouse but survived by children for a minimum of 30 days:

_____ equally between each child _____

_____ % to each surviving child _____

_____ % to other _____

_____ % to charities _____

C) If predeceased by Spouse and not survived by any children or grandchildren for a minimum of 30 days:

_____ % to parents _____

_____ % to parents of Spouse _____

_____ % to siblings _____

_____ % to charities _____

D) If Single:

_____ % to parents _____

_____ % to siblings _____

_____ % to other _____

_____ % to charities _____

E) When will minor children receive their inheritance?

_____ division at death with each receiving share at age _____

_____ hold as one trust until youngest reaches the age of _____

_____ hold as one trust until the oldest reaches the age of _____

F) If a child should die before becoming entitled to his or her share, what is to happen to that child's share of the residue of the estate? Consideration should be given to distributing such child's share amongst the Spouse, children and siblings of the dead child as the case may be.

G) Instructions from Spouse, if different from above.

6. ADDITIONAL INSTRUCTIONS IN WILL

Do you wish your executor to have the power to sell items of the residue as well the right to temporarily postpone the sale of the saleable assets?

Do you desire any capital and income taxes, plus Sucession Duties (if applicable) to be paid out of residue, thereby leaving legacies and specific gifts free of such impositions?

7. POWER OF ATTORNEY DURING LIFETIME

Do you wish to appoint an attorney during your lifetime to act on your behalf in the event of physical or mental infirmities?

_____ If so, who? _____

Instructions from Spouse, if different :
