

WILL PLANNING QUESTIONNAIRE

Personal Information:

Name (in full): _____

Spouse's Name: _____

Home Address: _____

Contact Info: Home: _____ Business: _____

Fax: _____ Email: _____

Marital Status: Married: _____ Date of Marriage: _____

Single: _____ ** Marriage Contract? yes no

Widow(er): _____

** Common-law: _____

** Separated: _____

** Divorced: _____

**** If there is a separation agreement, divorce order, marriage contract, or Cohabitation Agreement, please bring a copy with you to the meeting.**

Spouse:

Client:

Occupation: _____

Occupation: _____

Employer: _____

Employer: _____

Business Address: _____

Business Address: _____

Date of Birth: _____

Date of Birth: _____

Place of Birth: _____

Place of Birth: _____

Previous Marriage? Yes / No

Previous Marriage Yes / No

Family residing outside of Canada? Yes / No

Assets outside of Canada? Yes / No

Names of children and grandchildren:	Age:	Child or grandchild?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Other Beneficiaries (Name and Address)	Relationship to you	Age:
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Other than the individuals listed above, do you provide support to any other person? Yes / No

Are you under a legal obligation to support any other person? Yes / No

Are there any special circumstances? Yes / No

If you answered yes to any of these questions, describe below:

WHAT DO YOU WANT IN YOUR WILL?

Executor / Trustee:

Who is to look after your estate? One person only, or do you want two or more together?
Check with the person(s) first, to be sure they are prepared to act.

Alternate Executor / Trustee:

Who will act if the individual(s) you appoint is/are later unwilling or unable to act?

Guardian of Children:

If you have children under 18, who would you like to look after them in the event of your death (and the death of the other parent)? Also, who would look after any money left for them? Who would be the alternate guardian in case the person you choose is unwilling or unable to act?

FUNERAL INSTRUCTIONS: *Let your family know your wishes.*

DISTRIBUTION OF YOUR ESTATE(S):

Cash Gifts/Special Bequests:

Amount or Items:	To Whom:	Relationship:
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Residue:

Who gets all the rest? How is it to be divided, and amongst whom? What happens if one of these people dies before you; do you want their children to get their share?

Trust Provisions:

Do you want to make any special provisions? Example: For a spouse, or children, when are they going to inherit their share (age 25, 18, 21, etc.), or to ensure their circumstances? If so, describe:

Additional Notes or Questions:



ESTATE PLANNING ASSET/LIABILITY WORKSHEET

Assets

	In Your Name	In Spouse's Name	In Joint Name
Your Home (Current Market Value)	_____	_____	_____
Other Real Estate	_____	_____	_____
Cottages/Condos	_____	_____	_____
Bank Accounts	_____	_____	_____
Other Cash Accounts (Brokerage accounts, etc.)	_____	_____	_____
Stocks, Bonds, Mutual Funds	_____	_____	_____
Term Deposits	_____	_____	_____
Business Partnership Interests	_____	_____	_____
Company Pension Plan	_____	_____	_____
Personal Property (Jewellery, Vehicles, Household Furnishings, etc.)	_____	_____	_____
Annuities and other assets	_____	_____	_____
Collectibles (Market Value of Fine Art, Precious Metals, etc.)	_____	_____	_____
Offshore Assets	_____	_____	_____
Total Assets	\$ _____	\$ _____	\$ _____

Liabilities

	In Your Name	In Spouse's Name	In Joint Name
Mortgage(s)	_____	_____	_____
Loans to Family	_____	_____	_____
Support Payments	_____	_____	_____
Other loans or debt	_____	_____	_____
Contingent Loans (Loan Guarantees)	_____	_____	_____
Total Liabilities	\$ _____	\$ _____	\$ _____

Net Worth / Net Estate

Total Assets	_____	_____	_____
Subtract: Total Liabilities	_____	_____	_____
Net Worth/Net Estate	\$ _____	\$ _____	\$ _____

My Net Worth: \$ _____

My Spouse's Net Worth: \$ _____

Our Joint Net Worth: \$ _____