

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: |
|------------------|----------|---------------|
| <hr/> | <hr/> | <hr/> |
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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: \$ _____