

PLANNING YOUR WILL

PERSONAL DETAILS:

Person 1

Person 2 (if joint wills)

Full Name(s):

Are you known by any other name(s)?

Municipality in which you reside:

Mailing Address:

Telephone Number:

Email Address:

Current marital status:

Were you previously married?

if yes, please bring any marriage contract or separation agreement

CHILDREN:

List Name(s):

Age

Single/Married

Grandchildren

Is any child disabled? If yes, provide particulars:

YOUR ASSETS:

Real Estate: ex. Home, cottage, farm etc.

List Address(s)	Estimated value	Amount of mortgage	Who is the property registered too?
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Bank Accounts:

List Bank(s)	Approximate balance	Who is listed on the account?
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Pensions, RRSPs, RRIFs:

List Company(ies)	Amount	Beneficiary(ies)
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Life Insurance:

List Provider(s)	Amount	Beneficiary(ies)
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Stocks and Bonds:

List Company(ies)	Approximate value	Who is/are they registered too?
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Other Assets: ex. electronic assets etc.

List Description(s)	Who are they registered too?
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Do you hold any assets jointly with anyone other than your spouse? Yes or No
If Yes, who is to inherit these upon your death?

YOUR EXECUTOR(S):

This is the person who will carry out the terms of your will and administer your estate

Primary Executor: *Who will act if able*

Do you wish to name your spouse? Yes or No

Name of Primary Executor, if not your spouse:

Address:

Alternate Executor: *Who will act if Primary Executor is unable*

Name:

Address:

Relationship to you:

Note: most individuals name their spouse as their Primary Executor if he or she is able, and a relative, adult child or friend as the alternate executor.

SPECIAL BURIAL INSTRUCTIONS (IF ANY):

Note: Burial instructions are a request only. Your executor is not bound to carry them out. You should advise your executor of any burial instructions while you are alive.

SPECIFIC BEQUESTS:

Specific items or sums of money that you would like to be given to a specific person, charity, or church

List Item(s)	Beneficiary	Relationship to Beneficiary	Address of Beneficiary
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These items will be given if:

Only you die

Both spouses are dead

YOUR BENEFICIARIES:

To whom you wish to leave your estate

Your spouse, if alive? Yes or No

Your children on the death of both spouses? Yes or No

Will children share equally?

At what age should children receive their share?

If any child dies before you, who should receive his or her share?

Others (describe):

GUARDIAN(S) OF CHILDREN:

*If both spouses are dead, who do you wish to raise your underage children? *

List Name(s)	Address	Relationship to you	Compensation
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POWERS OF ATTORNEY

Power of Attorney for Property

Principal Attorney(s):

Jointly/Severally

Alternate Attorney(s):

Jointly/Severally

Compensation	Yes or No
Gifts & Loans	Yes or No
Matrimonial Home	Yes or No

Power of Attorney for Personal Care

Principal Attorney(s)

Jointly/Severally

Alternate Attorney(s):

Jointly/Severally

Conditions or Restrictions	Yes or No
Living Will?	Yes or No
Organ Donation	Yes or No