

Information for Making a Will

The information that you are about to provide will be the basis for your discussions about your will and other estate and personal planning. You do not need evaluations or appraisals but simply a list of assets and liabilities – your best estimates should be sufficient for most discussions. However, how you own the legal title to your assets is important and, if you are not sure whether, for example, your house is owned jointly with another person, ask me to check since assumptions can cause later problems. Also, if possible, check with your financial institutions or financial advisor for beneficiary designations on life insurance policies and pension plans.

Part 1: Family Information

First Name
 Last Name
 Address
 Date of Birth
 Phone (home)
 Phone (business)
 Phone (cell)
 Facsimile
 Email
 Marital Status

Spouse's Name
 Spouse's Date of Birth

Child's Name
 Child's date of birth
 Child's address

Child's Name
 Child's date of birth
 Child's address

Child's Name
 Child's date of birth
 Child's address

Child's Name
 Child's date of birth
 Child's address

Part 2: Assets

1. Real Estate

a. list of properties

b. list of title holders

2. Bank Accounts

a. list of accounts

3. Life Insurance

a. Policies held

b. Beneficiaries

4. Investments – RRSPs, RIFs, pensions and annuities

Part 3: Liabilities

1. Mortgages payable by you

a. Name of mortgagor

b. Amount owing

c. Is mortgage insured?

2. Other debts – list credit cards, lines of credit, loans, etc.

a. Name of Creditor

b. Amount owing

a. Name of Creditor

b. Amount owing

a. Name of Creditor

b. Amount owing

Part 4: Appointment of Executors

The executor is the person in charge of administering your estate and following through on your instructions. Who will this be?

In the event that your first choice cannot complete the task, do you wish to name an alternate? If so, who will this be?

Part 5: Instruction for Gifts

Special Bequests:

A specific bequest is when you wish to give an identifiable item to a beneficiary such as a car or a specific sum of money. If you wish to do this, set out what you wish to give and to whom.

General Bequests:

This is the “catch all” clause that gives away everything that wasn’t mentioned as a specific bequest. Who is to receive the balance of your estate?

Taking Age:

If your beneficiary is not at least 18 years of age, at what age would you like them to receive their inheritance?

Guardians:

Who would you like to appoint as your child or children’s guardian(s) and custodian(s) until they reach the age of majority?

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