

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

