

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, we recommend that you check with your financial institutions or financial advisor for confirmation if an account is held jointly, and for beneficiary designations on life insurance policies and pension plans. Your Will only deals with assets that are not held jointly and that are not specifically designated.

Part 1: Family Information

First Name
Last Name
Address
Date of Birth
Phone (home)
Phone (business)
Phone (cell)
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

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? Please provide name and relation to you.

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

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, family heirloom or a specific sum of money. If you wish to do this, please provide a brief description of what you wish to give and the name and relation to whom it is being left to. If you wish to provide a charitable donation, please provide the amount and the Charity name.

Distribution of your Estate: This is the “catch all” clause that gives away everything that wasn’t mentioned as a specific bequest (the “residue” of your estate). Who is to receive the balance of your estate? Please provide name(s), relation to you and percentage of your estate he/she is to receive. In the event your first choice has predeceased you, who is your alternate choice to receive the balance of your estate? Please provide name(s), relation to you and percentage of your estate he/she is to receive.

Taking Age: If not stated to the contrary, your beneficiary will receive his/her inheritance at 18. If you want it paid out at an older age, please state at what age would you like them to receive their inheritance? If you would like it paid in stages as opposed to a lump sum, please provide age and percentage for the distribution.

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? Please provide name(s) and relation to you. In the event your first choice is unable or unwilling to act, if you wish to appoint an alternate, please provide the name(s) and relation to you.

Part 6: Funeral/Disposition Wishes

Please indicate here if you have pre-arranged for cremation, burial and/or funeral service and provide brief particulars. If no arrangements have been made and you would like to state your wishes for funeral and burial, please provide the particulars.

If any of the following apply, please contact us to obtain particulars of further information we require from you:

- *Do you have a marriage contract with your spouse?*
- *Do you have a separation agreement with a former spouse?*
- *If you are living common-law, do you intend to marry at some point in the future?*
- *Do you solely own your home but wish to permit a family member to continue to reside in your home after your death?*
- *Do you have any shares or other interest in a private corporation?*
- *Do you have any beneficiaries that are disabled?*
- *Do you have a family member that is indebted to you?*
- *Do you have a child that you are intentionally leaving out of your Will?*

If you have any questions when going through this form, please do not hesitate to contact us. If the designated areas do not provide enough space, please use the reverse side or additional paper for your details.



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