

WILL INSTRUCTION QUESTIONNAIRE

I would ask that you review and complete the enclosed questionnaire before I meet with you to ensure that you have the necessary information available to provide to me when I meet with you.

It will also give you the opportunity to think about the topics we will discuss at your appointment.

Please ensure that you have the full legal names of all parties being named as: Executors, Beneficiaries, Guardians or Power of Attorney .

***** Do not use Nicknames or initials.

WILLS INFORMATION

Full Legal Name: _____

Other names used: _____

Address: _____

_____ Postal Code _____

Phone: _____ Alternate Phone _____ Email _____

Occupation: _____ (former Occupation if Retired) _____

Date of Birth: _____ Place of Birth: _____ Citizenship _____

Marital Status : Married? _____ Common Law? _____ Single? _____ Divorced? _____ Separated? _____

Spouse's Name: _____ Spouse Former Name? _____

Spouse D.O.B: _____ Place of Birth _____ Citizenship _____

Date of Marriage _____ Place of Marriage _____

Common law spouse? If yes, please indicate: Date of cohabitation: _____

Are you contemplating a marriage in near future? _____

Any previous marriages or Common Law Relationships? _____

Involved in any Family Law Proceedings _____

Child Support? _____ Custody Issues? _____

Alimony? _____ Legally divorced? _____ Separated? _____

Details of Your Children:

Name	Occupation	City of Residence	Age	Other Parent's Name
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Does your spouse have children from a previous relationship? If yes, provide details below:

Name	Occupation	City of Residence	Age	Other Parent's Name
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Are any of your children mentally incompetent? _____ (* If yes please contact Suzanne, as you will likely need to have your Will prepared by a lawyer with special trust provisions)**

Have any of your children predeceased you? _____ If yes, did they have children? _____

If you have children under the age of 19, who would you like to appoint as their guardian/s?

	Guardian's name	Relationship to you	City of Residence	Age
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1st _____

2nd _____

Where do you do your Banking ?

Name of Bank	Joint Account?	Type of Account	Estimated Value
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Do you own real estate? Yes ___ No ____

Address	Jointly Owned?	Type of Property	Estimated Value
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Any other investments ? If yes, please provide details?

Type of Investment?	Location	Estimated Value ?
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Any Pension Plans or Life Insurance?

Name	Designated Beneficiary/ies?	Value
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Do you own any foreign assets? _____ Do you have a safety deposit box? _____

Do you own any collectible items worth more than \$ 5,000.00? _____

Notes: _____

What is your source of Income? (Please provide details below)

Name	Monthly Amount
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Do you own a business? _____ If yes- Incorporated? _____ Proprietorship? _____ Partnership? _____

Other details _____

Does anyone owe you any money? _____

Any other assets/information: _____

What are your typical Monthly expenses each month?

Name of Expense

Monthly Amount

Any loans or mortgages? _____ Are they life insured? _____

Name of Lender

Total Debt Owning

Monthly Payment

Have you signed any personal guarantees or co-signed on any loans or mortgages ? _____

Any other debts or information regarding debts? _____

Who would be your first choice to be your executor/s?

Name of Executor/s

Relationship

Age

Occupation

Why is this a good choice for Executor? _____

If your first choice of Executor could not act or continue to act, who would you choose as an alternate?

Name of Alternate Executor/s

Relationship

Age

Occupation

Funeral arrangements and wishes: _____

Have you prepaid or pre-arranged your funeral arrangements? (If yes, provide details)

How would you like to have your estate distributed?

Beneficiary/ies Name	Relationship	Age	Gift or Percentage of Estate
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_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

If the above-mentioned Beneficiary/ies predeceased you, what would you like to have happen to their share of your estate?

***** Please Note*****

If beneficiaries are under the Age of 19, funds must be held in trust until they reach age 19. If you are wanting funds held in trust, beyond the Age of 19 you may need to have a special trust fund set up by a lawyer. If this applies, please contact me as soon as possible to determine if you will need to have your Will prepared by a lawyer.

Do you have a Power of Attorney? _____ Where is the original? _____ Copy? _____

Would you like to do a Power of Attorney? _____ If yes who would you like to appoint?

Name: _____ Relationship to you? _____

Address: _____

Postal Code _____

Phone _____ Email _____

Occupation _____ Date of Birth _____

Name: _____ Relationship to you? _____

Address: _____

Postal Code _____

Phone _____ Email _____

Occupation _____ Date of Birth _____

Name: _____ Relationship to you? _____

Address: _____

Postal Code _____

Phone _____ Email _____

Occupation _____ Date of Birth _____

If more than one attorney: Act Jointly? Act Separately? Other? _____
