

WILL CHECKLIST (PERSONAL DATA SHEET)

Date:

Lawyer:

PART I: FAMILY INFORMATION

1. Full Name:
2. Address:
3. Date and Place of Birth:
4. Phone(H):
Phone(W):
5. Spousal Status (Married/Common Law/Single)

Spouse's Name:
Address:
6.
 - 1) Child's Name:
Date of Birth:
Address:
 - 2) Child's Name:
Date of Birth:
Address:
 - 3) Child's Name:
Date of Birth:
Address:
7. Others to be Named in Will as Beneficiaries

Name:
Address:
Date of Birth:

Name:
Address:
Date of Birth:

Name:
Address:
Date of Birth:

PART II GENERAL

1. Do you have a Will?
2. Does your spouse have a Will?
3. Receiving benefits from an estate or trust? If so please give particulars
4. Have you set up a trust to benefit another person? Give particulars.
5. You or your spouse have a marriage or cohabitation contract?
6. Do you own an interest in a business? Provide copies of business agreements.
7. Married more than once? Separation agreements, divorce decree?

PART III ASSETS

1. Automobile and Boats

Item:

Item:

Value:

Value:

In whose name:

In whose name:

2. Approximate value of household goods and contents:

3. Real Estate

Address:

Address:

Value:

Value:

Original cost:

Original Cost:

In whose name:

In whose name:

4. Bank Accounts

Name of bank:
Address:
Account No:
In whose Name:

Name of bank:
Address
Account No:
In Whose Name:

5. Safety Deposit Box

Location:
Box Number:

6. Life Insurance

Name of Company:
Policy number:
Named beneficiary:
Value to Estate:

Name of Company:
Policy Number:
Named Beneficiary:
Value to Estate:

7. RRSPs, Pensions and Annuities

Name:
Contract Number:
Named Beneficiary:
Value to Estate:

Name:
Contract Number:
Named Beneficiary:
Value to Estate:

8. Investments

Please list all stocks and or bonds and their original costs and estimated market values:

PART IV LIABILITIES

1. Mortgages payable by you:

Name of Mortgagee
Amount Owing:

Name of Mortgagee:
Amount Owing:

2. Other Debts

Name of Creditor:
Amount Owning:

Name of Creditor:
Amount Owning:

PART V SUMMARY

| | |
|---------------------------------|----|
| Total value of Assets | \$ |
| Less total value of Liabilities | \$ |
| Net value of Estate | \$ |

PART VI WILL INSTRUCTIONS

1. Disposition of household goods, personal effects, jewellery, automobiles etc.:
2. Executors:

Name:
Address:

Name:
Address:
3. Cash Gifts to Individuals or Charities
4. Disposition of RRSPs, annuities, pensions:
5. Disposition of Residue (including trust for spouse and/or minors, payment of income from trust, payment of capital from trust, time of distribution, provision should any beneficiaries predecease, etc.):
6. Special clauses to be included
 - (a) Appointment of guardians and custodians for children:

Name(s):

Address(es):

(b) Family Law clauses:

7. Funeral and other special instructions:

POWERS OF ATTORNEY

8. Do you have a general financial power of attorney? Who would you like to appoint?

Primary Attorney's Name(s):

Alternate Attorney's Name(s):

9. Do you wish to have a power of attorney for personal care? Who would you like to appoint?

Primary Attorney's Name(s):

Alternate Attorney's Name(s):

To what extent would you want life support measures to be taken: