

WILL AND ESTATE QUESTIONNAIRE

SECTION 1 FAMILY INFORMATION

PERSONAL INFORMATION

Full Name:

List any other names you are known by:

Date of Birth: _____

Place of Birth: _____

Address & Postal Code:

Home Phone: _____

Business Phone: _____

Occupation: _____

Employer: _____

Employer's Address:

Citizenship other than Canada? YES/NO
If yes, where? _____

Do you have a US green card? YES/NO

Do you holiday in the US for extended
periods of time each year? YES/NO

Spouses Full Name:

List any other names you are known by:

Date of Birth: _____

Place of Birth: _____

Address & Postal Code:

Home Phone: _____

Business Phone: _____

Occupation: _____

Employer: _____

Employer's Address:

Citizenship other than Canada? YES/NO
If yes, where? _____

Do you have a US green card? YES/NO

Do you holiday in the US for extended
periods of time each year? YES/NO

MARRIAGE INFORMATION

Marital Status: _____

Date and Place of Marriage: _____

Your Information

Previous Marriage? YES/NO
If yes, name of previous spouse and date of death / divorce / separation:

Obligations pursuant to previous marriages (e.g. spousal & child YES/NO maintenance)? YES/NO

If yes, please provide details: If yes, please provide details:

If you are single, separated or divorced:

Are you planning to marry in the near future? YES/NO
Give details:

Are you now cohabiting with anyone? Give details: YES/NO
If so, for how long?

Are you planning to separate or divorce in the near future? YES/NO
Give details:

Spouse's Information

Previous Marriage? YES/NO
If yes, name of previous spouse and date of death / divorce / separation:

Obligations pursuant to previous marriages (e.g. spousal & child YES/NO maintenance)? YES/NO

If yes, please provide details: If yes, please provide details:

If you are single, separated or divorced:

Are you planning to marry in the near future? YES/NO
Give details:

Are you now cohabiting with anyone? Give details: YES/NO
If so, for how long?

Are you planning to separate or divorce in the near future? YES/NO
Give details:

CHILDREN

Number of Children: _____

Are there any stepchildren, adopted children or illegitimate children of either spouse? YES/NO

Previous Marriage? YES/NO

Are any of your grandchildren adopted, stepchildren, illegitimate? YES/NO

If yes to any of the above questions, give details:

Are any of the children or grandchildren mentally or physically incapacitated? YES/NO

If yes, please describe:

Have any of your children predeceased you? YES/NO

If yes, give the name and date of death of the deceased child and the names of their children, if any.

CHILD #1

Full Legal Name	Full Address	Date of Birth	Marital Status

Names and Ages of Their Children:

Full Name	Full Address	Date of Birth	Marital Status

CHILD #2

Full Legal Name	Full Address	Date of Birth	Marital Status

Names and Ages of Their Children:

Full Name	Full Address	Date of Birth	Marital Status

CHILD #3

Full Legal Name	Full Address	Date of Birth	Marital Status

Names and Ages of Their Children:

Full Name	Full Address	Date of Birth	Marital Status

CHILD #4

Letter	Full Legal Name	Full Address	Date of Birth	Marital Status

Names and Ages of Their Children:

Full Name	Full Address	Date of Birth	Marital Status

**SECTION 2
INSTRUCTIONS FOR WILL**

EXECUTORS

If your spouse is the sole beneficiary of your Estate, it may be preferable to name him/her as the primary Executor. You should also name alternates, in the event your first choice is unable to act.

For tax reasons, it is not advisable to choose a Executor who resides outside of Canada. If you have more than one Executor, it would be preferable if at least one of them is a resident of Alberta.

FIRST EXECUTOR

Full Name	Full Address	Relationship	Age

ALTERNATE #1

Full Name	Full Address	Relationship	Age

ALTERNATE #2

Full Name	Full Address	Relationship	Age

Are your Executors to be Joint and be required to act together? YES/NO

GUARDIAN(S) FOR MINOR CHILDREN

Full Name	Full Address	Relationship	Age

ALTERNATE GUARDIAN(S) FOR MINOR CHILDREN:

Full Name	Full Address	Relationship	Age

BENEFICIARIES

The following choices as to distribution of your Estate are for your convenience only. It is intended to get you thinking about the issues to be discussed with your lawyer.

All to spouse: YES/NO

Other: _____

If spouse predeceases me:

Equally to all children? YES/NO

All to children but different percentages to particular children? YES/NO

At what age are your children to receive their share of your Estate?

___ all at 18? or another age _____
___ % at _____ years _____ % at _____ years
___ % at _____ years
___ other _____

The age of majority is 18 in Alberta. Unless specified otherwise, the Will will be drafted so that your Executor will hold each child's share in trust until the specified age with power to encroach on income and capital for education, maintenance and support.

If one child dies before you do, or before attaining the age at which she/he is entitled to the share, who shall receive that share or the amount remaining?

___ the children of the deceased child (my grandchildren)
___ my surviving children only
___ other _____

FAMILY DEMISE

How is your Estate to be divided if you and your spouse and all your children and grandchildren are killed in a common accident, or if any of your children or grandchildren survive you but die before becoming entitled to receive their entire portion of your Estate?

___ 1/2 to my parents and 1/2 to spouse's parents
___ 1/2 to my brothers and sisters and 1/2 to my spouse's brothers and sisters
 who are then alive in equal shares
___ charities
___ other _____

SPECIFIED GIFTS OR LEGACIES

List items or amounts and who is to receive it:

(Caution: Do not list any items unless they are definitely valuable or of great sentimental value or unless you are prepared to pay your lawyer to draft the Will and change it when an item is sold or replaced).

MONEY FOR GUARDIANS

If it becomes necessary for the guardians that you have named to look after and raise your minor children, will they require:

- A lump sum of money to be paid to them to buy a larger house, to renovate their current house, to buy a larger vehicle etc. in order to accommodate your children?
- If so, then how much would you like to give to them for this purpose?
- A monthly amount to be paid to them to assist with the additional monthly expenses that they will incur as a result of raising your children?
- If so, then how much per month per child would they require?

EXECUTOR COMPENSATION

Executors are entitled to receive compensation for the time, effort and expertise that is spent by them in administering your Estate. This can be a lump sum amount or a percentage of your Estate. If you wish your Executor to receive compensation for acting on your behalf, you may specify that they be compensated according to the usual Rules, or you may specify the dollar amount or percentage of your Estate they are to receive. They will also be entitled to reimbursement for any out-of-pocket expenses they incur in administering your Estate.

In Alberta a rough guideline of the compensation that a Executor is entitled to is 1% to 5% of the value of your Estate. If you wish to specify in your will the compensation that is to be received by your Executor will it be:

- according to the usual Rules
- a percentage of your Estate, and if so, what will that percentage be?
- a set amount, and if so, how much will that amount be? _____

If you have named more than one (1) Executor to act on your behalf, is compensation shared or are they each to receive the amount or percentage specified? _____

**SECTION 3
FINANCIAL INFORMATION**

The purpose of this section is to provide us with sufficient information to assist you in planning your Estate and to ensure we include sufficient powers in your Will. It will also inform your Executor of all of your assets to make sure they do not miss any. If there is insufficient space to answer any of the following sections, please list on a separate paper.

In left margin please indicate ownership of assets:

J - owned jointly by husband and wife

H - owned by husband

W - owned by wife

0- owned by husband and/or wife with some other person (please describe)

REAL ESTATE

Principal Residence: _____

Municipal Address: _____

Legal Description: _____

Name(s) on Title: _____

Ownership: Joint Tenancy or Tenancy in Common

OTHER LAND

INTEREST IN MINES AND MINERALS

BANK ACCOUNTS

BANK NAME & ACCOUNT NUMBER	LOCATION/ADDRESS

GUARANTEED INVESTMENT CERTIFICATES AND TERM DEPOSITS

BANK NAME & ACCOUNT NUMBER	LOCATION	MATURITY DATE

LIFE INSURANCE POLICIES

COMPANY	VALUE	POLICY #	BENEFICIARY

SEGREGATED FUNDS

COMPANY	VALUE	BENEFICIARY

PENSION PLANS

COMPANY	BENEFICIARY

REGISTERED RETIREMENT SAVINGS PLANS AND REGISTERED RETIREMENT INCOME FUNDS

FINANCIAL INSTITUTION	LOCATION	BENEFICIARY

DEBTS OWED TO YOU (By Children or Anyone Else)

Does anyone owe you money (e.g. Personal Loans, Promissory Notes, Mortgages)?

YES/NO

If yes - provide details:

BUSINESS INTERESTS (e.g. private company, partnership, sole proprietorship, etc.)?

Please describe:

**SHARES IN PUBLIC CORPORATIONS, MUTUAL FUNDS,
BONDS AND DEBENTURES**

(Do not list all Shares if portfolio changes regularly)

VALUABLE PERSONAL PROPERTY

(e.g. automobiles, mobile homes, boats, heirlooms, etc.)

Description	Location of Property

ANY OTHER ASSETS NOT LISTED ABOVE

ADDITIONAL INFORMATION

Do you have an interest in any assets outside Alberta?

YES/NO

Do you have an interest in any assets outside Canada?

YES/NO

Have you made any loans or advances to family members or others that are to be repaid?

YES/NO

Have you made any loans or advances to family members or others that are to be forgiven?

YES/NO

If you have answered yes to any of the above questions please provide further details.

**SECTION 4
LIABILITIES**

CREDITOR AMOUNT

Are any of your debts life insured? YES/NO

If you have answered yes to any of the above questions please provide further details.

SAFETY DEPOSIT BOX

Location	Box Number	Registered Name(s)	Location of Keys

FUNERAL ARRANGEMENTS

On your death do you want your body to be buried: YES/NO

If you have answered yes, do you have a preference as to where it should be buried?

Would you prefer that your body be cremated? YES/NO

If you have answered yes, do you have any instructions as to what is to be done with your ashes?

Have you already pre-arranged these matters? If so, with which company:
