

File No.: _____

INFORMATION REQUIRED TO PREPARE YOUR WILL

DATE: _____

How were you referred to our firm? _____

A. FAMILY AND PERSONAL INFORMATION

1. FAMILY DETAILS

Full Name

First Middle Last (Maiden or other name used)

Address

Street/Rural Route City/Township

Province Postal Code

Telephone

Home Office

Date of Birth _____ S.I.N. _____

Occupation _____ Present Employer _____

Marital Status _____ Place of Permanent Residence _____

Date of Marriage _____ Place of Marriage _____
(if applicable) (if applicable)

Date of Divorce _____ Place of Divorce _____
(if applicable) (if applicable)

Full Name of Spouse

First Middle Last (Maiden or other name used)

Address of Spouse (if different from above)

Street/Rural Route City/Township

Province Postal Code

Spouse Date of Birth _____ S.I.N. of Spouse _____

Occupation of Spouse _____ Present Employer _____

Are you presently living with your Spouse? _____

Date of Divorce of Spouse from previous marriage (if applicable) _____ Place of Divorce of Spouse from previous marriage _____

If not married, are you preparing your will in contemplation of Marriage? _____

If yes, name of intended Spouse _____

Children and/or relatives to inherit under will:

NAME	RELATIONSHIP	DATE OF BIRTH	ADDRESS
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

2. PROFESSIONALS INVOLVED WITH YOUR FAMILY

Minister _____
Full Name Address

Lawyer _____
Full Name Address

Accountant _____
Full Name Address

Insurance Agent _____
Full Name Address

Financial Advisor _____
Full Name Address

Broker _____
Full Name Address

Family Doctor _____
Full Name Address

3. LOCATION OF IMPORTANT DOCUMENTS

Current Will _____
Life Insurance Policy _____
Funeral or Burial Property Deed _____
Securities and Property Deeds _____
Automobile Registration _____
Marriage Certificate _____
Tax Records _____
Birth Certificate _____
Passport _____
Safety Deposit Box (Location and No.) _____
List of Credit Card Nos. _____
Trust Agreements _____
Business Agreements _____
Other _____

B. ASSET INVENTORY

1. REAL ESTATE (indicate which is principal residence)

Location & Type	Sole/Joint Ownership	Current Value (do not deduct Mortgage)	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

2. HOUSEHOLD GOODS AND FURNITURE

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

3. HEIRLOOMS, ARTWORK, JEWELLERY AND OTHER COLLECTIONS

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

4. AUTOMOBILES, BOATS AND RECREATION VEHICLES

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

5. FARM MACHINERY, TOOLS, LIVESTOCK AND QUOTAS

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

6. CASH DEPOSITS

Bank	Account	Sole/Joint Ownership	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

7. STOCKS (Publicly Traded)

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

8. BONDS AND INVESTMENT CERTIFICATES

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

9. MONEY INVESTED IN MORTGAGES AND PERSONAL LOANS

Description:	Sole/Joint Ownership	Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

10. INSURANCE

Name of Company	Type	Beneficiary	Husband's Share	Wife's Share
_____			\$ _____	\$ _____

11. R.R.S.P.'S AND COMPANY PENSION PLANS

Name of Company	Type	Beneficiary (if any)	Husband's Share	Wife's Share
_____			\$ _____	\$ _____

12. BUSINESS & PARTNERSHIP INTERESTS

Name & Nature	Sole Proprietorship or Partnership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

Details of Shareholders and/or Partnership Agreements: _____

13. TRUST FUNDS THAT YOU ARE BENEFICIARY OF

Source	Purpose	Your Rights to Trust Fund	Husband's Share	Wife's Share
_____			\$ _____	\$ _____

14. TRUST FUNDS THAT YOU ARE TRUSTEE FOR

Nature of Trust	Beneficiary	Description of Property
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

\$
\$

These funds are not included in the value of your estate.

15. OTHER ASSETS

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	_____	_____	_____

TOTAL VALUE OF ASSETS:

\$ _____ \$ _____

16. APPROXIMATE DEBTS & MORTGAGES OUTSTANDING

Nature of Debt	Name & Address	Joint/Sole	Amount	Husband's Share	Wife's Share
_____	_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	_____	_____	_____	_____

TOTAL AMOUNT OF DEBTS: \$ _____ \$ _____

TOTAL NET VALUE OF ESTATE: \$ _____ \$ _____

17. OTHER INFORMATION

Details of domestic contracts _____

Details of support obligations, either moral or legal _____

Details of any relevant personal situations (ie, disabled, concerns re: spending habits of family)

(NOTE: REMAINDER OF QUESTIONNAIRE TO BE COMPLETED WITH LAWYER)

C. NAMING OF EXECUTOR/EXECUTRIX

Do you want your spouse as executor/executrix if she/he survives? _____

If not, who is to act?

NAME	ADDRESS	RELATIONSHIP (IF ANY)
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Who is to act as alternative executor(s) or executrix(s)?

(HUSBAND)

NAME: _____

ADDRESS: _____

RELATIONSHIP (IF ANY) _____

(WIFE)

NAME: _____

ADDRESS: _____

RELATIONSHIP (IF ANY) _____

In the case of two executor(s) or executrix(s) is one to have the deciding vote? _____

If so, who? _____

In the case of three or more executor(s) or executrix(s), is a majority decision binding? _____

Are there any special instructions to the executor(s) or executrix(s), such as physical custody of assets, etc?

D. NAMING OF GUARDIAN FOR CHILDREN

Names of Guardian(s):

First	Middle	Last	Address
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First	Middle	Last	Address
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First	Middle	Last	Address
-------	--------	------	---------

First	Middle	Last	Address
-------	--------	------	---------

Name of Guardian(s) of children's Estate if different from above:

First	Middle	Last	Address
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E. FUNERAL INSTRUCTIONS

Any funeral instructions included in your will should be conveyed to your executor or executrix now.

Instructions from Spouse, if different from above.

F. DISTRIBUTION OF ESTATE

1. **PERSONAL EFFECTS (i.e. jewellery, clothing, keepsakes, etc.)**

If Spouse survives, are all personal effects to go to Him/Her? _____

If answer is NO, or Spouse does not survive for thirty days, how is personal property to be distributed?

1) To living Children as they may agree _____

2) In accordance with a non-binding memorandum filed with your will _____

3) In accordance with a binding memorandum (specific gift within) accompanying your will _____

4) To estate trustee with request that personal property be distributed according to his/her discretion _____

5) Other (please specify details) _____
Instructions for Spouse, if different _____

2. LEGACIES (MONEY) and/or SPECIFIC GIFTS (including Real Property)

Name of Person/Organization As beneficiary	Money/Property to be given	Alternative Beneficiary
_____	_____	_____
_____	_____	_____

Instructions from Spouse, if different from above _____

3. DISPOSITION OF INSURANCE, R.R.S.P., R.H.O.S.P. etc. (if different from instructions in policies)

Policy or Plan: _____ Beneficiary: _____

4. DISPOSITION OF BUSINESS OR PARTNERSHIP INTEREST

Is there need for specific property to be held in trust, such as a house? _____

If so, then specify the following:

Trust Property _____

Beneficiary _____

Cost of Care of Trust Property _____

Termination of Trust _____

Instructions from Spouse, if different from above _____

5. RESIDUE

a) If married (with or without children) and Spouse survives for a minimum of 30 days, then:
- all to Spouse? _____

- If not, then:

_____ % to surviving Spouse _____

_____ % to each surviving child _____

_____ % to other _____

_____ % to charities _____

b) If predeceased by Spouse but survived by children for a minimum of 30 days:

_____ Equally between each child _____

_____ % to each surviving child _____

_____ % to other _____

_____ % to charities _____

c) If predeceased by Spouse and not survived by any children or grandchildren for a minimum of 30 days:

_____ % to parents _____

_____ % to parents of Spouse _____

_____ % to siblings _____

_____ % to charities _____

d) If single:

_____ % to parents _____

_____ % to siblings _____

_____ % to other _____

_____ % to charities _____

e) When will minor children receive their inheritance?

_____ division at death with each receiving share at age _____

_____ hold as one trust until youngest reaches the age of _____

_____ hold as one trust until the oldest reaches the age of _____

f) If a child should die before becoming entitled to his or her share, what is to happen to that child's share of the residue of the estate? Consideration should be given to distributing such child's share amongst the Spouse, children and siblings of the dead child as the case may be.

g) Instructions from Spouse, if different from above _____

6. ADDITIONAL INSTRUCTIONS IN WILL

Do you wish your executor to have power to sell items of the residue as well as the right to temporarily postpone the sale of the saleable assets? _____

Do you desire any capital and income taxes, plus Succession Duties (if applicable) to be paid out of residue, thereby leaving legacies and specific gifts free of such impositions? _____

Do you wish to exclude illegitimate children of either yourself or your offspring as beneficiaries of your estate:

7. POWER OF ATTORNEY DURING LIFETIME

Is a Power of Attorney for Property to be prepared? _____

Who is to be the attorney and alternate attorneys?

Husband

Wife

1. _____

1. _____

2. _____

2. _____

3. _____

3. _____

Do you wish the non-heroic clause?

Husband _____

Wife _____

**WOOD, WHITE & GOLD LLP
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