

Estate Information Checklist

- Unless otherwise mentioned, all listed sections are in the Wills and Succession Act

A. Deceased		
Name:		
And any other name(s) by which known:		
Last residence address in full:		
Date of birth:		
Place of birth:		
Date of death:		
Did the deceased die before [date of Proclamation]?		Y / N
Place of death:		
Was the deceased under 18 at time Will was made?		Y / N
Habitual province/state of residence:		
Did the deceased hold property jointly with another person with the right of survivorship?		
Did the joint owners die at the same time or in circumstances rendering it uncertain which of them survived the other?		
B. Will (if any)		
Did the deceased have a Will?		Y / N
Date of the Will:		
Is this before or after [date of Proclamation]? FEB. 1, 2012		Before / After Proclamation
Deceased's Age at signing of Will:		
Name of first witness:		
Name of second witness:		
Are any of the witnesses also beneficiaries of the Will (s.40)?		Y / N

Are there any inconsistencies with the will that require Court intervention (s.36-39)?		
Was there a disposition of a gift during the lifetime of the deceased that may make up a part of the estate? (s.109) <i>Includes transfer of property ie. gift, loan or other transmission of property interest</i>		
C. Immediate Family		
(a) Spouse (or Adult Interdependent Partner)		
Name:		
Complete address:		
Date of marriage: (s.23 – Will no longer revoked by subsequent marriage)		
Is there a potential matrimonial property claim by a surviving spouse of the deceased? (s.5 and 6 of <i>Matrimonial Property Act</i>)		
Have the spouses been separated?		
If so, as of what date?		
Have they lived “separate and apart” for more than 2 years?		
Do the parties have a declaration of irreconcilability?		
Is there a court order or agreement that is intended to permanently finalize their marital affairs?		
Is there an intention in the will for a former spouse to take a gift despite dissolution of the marriage?		
(b) Former Spouses (who require notice under the <i>Matrimonial Property Act</i> due to divorce or death within the past 2 years)		

Name:	
Complete Address:	
Date of Death:	
Date of Divorce:	
Is the divorce after [date of Proclamation] (s.25)?	Y / N
Is there a gift in the Will to a former spouse?	
Is there a former spouse and an Adult Interdependent Partner?	
Does the deceased have an obligation under a Support Order or Agreement (s.80.1, <i>Family Law Act</i>) that may be subject to variation?	
Is there an obligation by a surviving parent of the children of the deceased under a Support Order or Agreement (s.80.1, <i>Family Law Act</i>)?	
Is there a surviving spouse or partner who might have the right to temporary possession of the family home or right to household goods under s.76?	
intention in the will for a former spouse to take a gifts?	
(c) Children (including any children legally adopted by the deceased and children outside of a marriage)	
1. Name:	
Complete address:	
Date of Birth:	
Age:	
Date of Death:	
Died leaving children?	
If the child is under the age of 18, who are the surviving parents/guardians of this child? (s.22, <i>Family Law Act</i>)	
Was there a testamentary guardian appointed?	

2. Name:	
Complete address:	
Date of Birth (if under 18):	
Date of Death:	
Died leaving children?	
If the child is under the age of 18, who are the surviving parents/guardians of this child? (s.22, <i>Family Law Act</i>)	
Was there a testamentary guardian appointed?	
3. Name:	
Complete address:	
Date of Birth (if under 18):	
Date of Death:	
Died leaving children?	
If the child is under the age of 18, who are the surviving parents/guardians of this child? (s.22, <i>Family Law Act</i>)	
Was there a testamentary guardian appointed?	
Other Dependents of the Deceased:	
Did the testator stand in the place of a parent towards a grandchild or a great-grandchild? If so, specify.	
Was the testator the grandchild/great-grandchild's primary source of financial support? (s.73)	
Are any of the children students between the ages of 18-22? If so, specify.	
Are there any adult children of the deceased who are unable to earn a livelihood by reason of physical or mental disability?	
Has a Trustee been appointed for any adult child?	

D. Personal representative(s)		
(The Executor(s) named in the Will)		
1. Name		
Complete address		
Relationship to deceased		
Is the PR under 18 years of age?		
2. Name		
Complete address		
Relationship to deceased		
Age (if under 18):		
<p>Is there any conflict between PR or Applicant for Administration with respect to any claims against the estate? <i>If so, there may need to be an independent 3rd party to apply to be the administrator until the claim has been settled.</i></p>		
E. Beneficiaries		
1. Name:		
Age and Date of Birth:		
Relationship:		
Complete address:		
Interest in Estate:		
2. Name:		
Age and Date of Birth:		
Relationship:		
Complete address:		
Interest in Estate::		
3. Name:		
Age and Date of Birth:		
Relationship:		
Complete address:		
Interest in Estate:		

4. Name:		
Age and Date of Birth:		
Relationship:		
Complete address:		
Interest in Estate:		
F. Assets and Debts in Alberta		
<i>Include funeral and burial expenses</i>		
Financial Assets		
1. Name of Institution:		
Address:		
Type of Account:		
Account Number:		
2. Name of Institution:		
Address:		
Type of Account:		
Account Number:		
3. Name of Institution:		
Address:		
Type of Account:		
Account Number:		
Properties		
1. Municipal Address:		
Legal Description (Plan/Block/Lot):		
Any encumbrances?		Y / N
2. Municipal Address:		
Legal Description (Plan/Block/Lot):		
Any encumbrances?		

Debts (including mortgages)		
1. Payee:		
Description:		
Amount outstanding:		
2. Payee:		
Description:		
Amount outstanding:		
3. Payee:		
Description:		
Amount outstanding:		

*For intestate estates where there is no spouse/partner or descendants, see the diagram for "Parentelic Distribution under the *Wills and Succession Act*, section 67"