

WILLS FUNDAMENTALS

APPENDIX 1 – WILL AND ESTATE QUESTIONNAIRE

SECTION 1 – FAMILY INFORMATION

PERSONAL INFORMATION

Full Name:

Spouses Name:

List any other names you are known by:

List any other names you are known by:

Date of Birth:

Date of Birth:

Place of Birth:

Place of Birth:

Address & Postal Code:

Address & Postal Code:

Home Phone:

Home Phone:

Business Phone:

Business Phone:

Occupation:

Occupation:

Employer:

Employer:

Employer's Address:

Employer's Address:

Citizenship other than Canada? YES/NO

If yes, where? _____

Citizenship other than Canada? YES/NO

If yes, where? _____

Do you have a US green card? YES/NO

Do you have a US green card? YES/NO

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

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

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MARRIAGE INFORMATION

Marital Status: _____

Date and Place of Marriage: _____

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

If yes, name of previous spouse and date of death / divorce / separation:

Date and Place of Marriage:	_____	Date and Place of Marriage:	_____
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Obligations pursuant to previous marriages (e.g. spousal & child maintenance)? YES/NO

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

If yes, please provide details:

If yes, please provide details:

If you are single, separated or divorced:

(a) Are you planning to marry in the near future? Give details:

(b) Are you now cohabiting with anyone? Give details:

(c) If so, for how long?

(d) Are you planning to separate or divorce in the near future? Give details:

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CHILDREN

Number of Children: _____

Are all the following children from your present marriage? YES/NO

If no, indicate with the appropriate letter beside each child:

P - from previous marriage (husband/wife)

A - adopted

O - born outside of present marriage

Letter	Full Name	Address	Date of Birth	Marital Status	Names and Ages of Their Children

Are there any stepchildren, adopted children or illegitimate children of either spouse? 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.

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SECTION 2 - INSTRUCTIONS FOR WILL

PERSONAL REPRESENTATIVE(S):

If your spouse is the sole beneficiary of your Estate, it may be preferable to name him/her as the primary PR. 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 PR who resides outside of Canada. If you have more than one PR, it would be preferable if at least one of them is a resident of Alberta.

1. Full Name: _____
Relationship: _____ Age: _____
Address: _____

ALTERNATES:

2. Full Name: _____
Relationship: _____ Age: _____
Address: _____

3. Full Name: _____
Relationship: _____ Age: _____
Address: _____

GUARDIAN(S) FOR MINOR CHILDREN:

1. Full Name: _____
Relationship: _____ Age: _____
Address: _____

ALTERNATE GUARDIAN(S):

2. Full Name: _____
Relationship: _____ Age: _____
Address: _____

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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.

1. All to spouse: YES/NO Other: _____

2. If spouse predeceases me: _____

Equally to all children? YES/NO

All to children but different percentages to particular children?

3. 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 PR 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.

4. If one child dies before you do, or before attaining the age at which s/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 _____

5. 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

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_____ 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 _____

6. 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).

7. 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?

8. PR Compensation:

Personal Representatives 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 PR 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.

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In Alberta a rough guideline of the compensation that a PR 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 PR 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 1 PR to act on your behalf, is compensation shared or are they each to receive the amount or percentage specified?

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BANK ACCOUNTS:

Bank Name	Location

GUARANTEED INVESTMENT CERTIFICATES AND TERM DEPOSITS:

Bank	Location	Maturity Date

LIFE INSURANCE POLICIES: Indicate Type: Term ("T") or Permanent ("P")

Company	Policy No.	Value	Beneficiary

SEGREGATED FUNDS:

Company	Value	Beneficiary

PENSION PLANS:

Company	Beneficiary

REGISTERED RETIREMENT SAVINGS PLANS AND REGISTERED RETIREMENT INCOME FUNDS:

Financial Institution	Location	Named Beneficiary

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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:

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1. Do you have an interest in any assets outside Alberta? YES/NO
2. Do you have an interest in any assets outside Canada? YES/NO
3. Have you made any loans or advances to family members or others that are to be repaid? YES/NO
4. 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.

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SECTION 4 - LIABILITIES

CREDITOR	AMOUNT
_____	_____
_____	_____
_____	_____

Are any of your debts life insured? YES/NO

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:
