

WILL AND ESTATE QUESTIONNAIRE

SECTION I - 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**

Spouse's Name:

List any other names they 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

Your Marital Status:

Spouse Information:

Date & Place of Marriage:

Previous Marriage? **YES/NO**

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

Date & Place of Previous Marriage:

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

If yes, please provide details:

Previous Marriage? **YES/NO**

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

Date & Place of Previous Marriage:

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

If yes, please provide details:

If you are single, separated or divorced:

(a) Are you planning to marry in the near future? _____

(b) Are you now cohabiting with anyone? _____

(c) If so, for how long? _____

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	Birth Date	Marital Status	Names & 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.

SECTION 2 - INSTRUCTIONS FOR WILL

EXECUTOR/EXECUTRIX:

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

Full Name: _____

Relationship: _____ Age: _____

Address: _____

ALTERNATES:

1. Full Name: _____

Relationship: _____ Age: _____

Address: _____

2. Full Name: _____

Relationship: _____ Age: _____

Address: _____

Please choose one of the following options for your Alternates:

- Alternates shall act jointly
- Alternates shall act separately (If Alternate #1 is unable/unwilling to act, then Alternate #2 shall act)

GUARDIAN(S) FOR MINOR CHILDREN:

1. Full Name: _____

Relationship: _____ Age: _____

Address: _____

ALTERNATE GUARDIAN(S):

2. Full Name: _____

Relationship: _____ Age: _____

Address: _____

Please choose one of the following options for your Guardians:

- Guardians shall act jointly
- Guardians shall act separately (If Guardian #1 is unable/unwilling to act, then Guardian #2 shall act)

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?
- All to children but different percentages to particular children?
- Other: _____

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

- _____ all at 18
- _____ % at _____ years
- _____ % at _____ years
- _____ % at _____ years
- _____ Other _____

The age of majority is 18 in Alberta. Unless specified otherwise, the Will shall be drafted so that your Executor/Executrix 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 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?

½ to my parents and ½ to my spouse's parents

½ to my brothers and sisters and ½ 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. Executor/Executrix Compensation:

Your Executor/Executrix is generally 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/Executrix to receive compensation for acting on your behalf it is a good idea to 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/Executrix 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/Executrix will it be:

- A percentage of your Estate? If so, what will that percentage be? _____%
- A set amount? If so, how much will that amount be? \$_____
- If you have named more than 1 Executor/Executrix to act on your behalf, are they to share the compensation equally, or are they each to receive the amount or percentage specified above? _____

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/Executrix 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

O - 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 Tenancy in Common

Other Land:

Interest In Mines and Minerals:

BANK ACCOUNTS:

Bank Name and 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

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)

Yes

No

If yes, provide details: _____

Shares in Public Corporations, Mutual Funds, Bonds and Debentures (Do not list all Shares if portfolio changes regularly)

Yes

No

If yes, provide details: _____

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

Description or Location of Property

Any other assets not listed above

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:

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
