

WILL AND ESTATE QUESTIONNAIRE

SECTION I – FAMILY INFORMATION

PERSONAL INFORMATION:

Please fill out the information in all sections fully and completely, even if there appears to be repetition. If you and your spouse are doing “Couple’s Wills,” we ask each of you to fill out **separate questionnaires**, even if the information seems relatively the same.

We ask you to include **middle names** for any person you identify in the questionnaires (including yourself), as well as identifying **your relationship** to this person (ie. “my sister-in-law” “my friend” etc.), and the **city** and **province** in which that person resides.

Full Name:

Spouse’s Full Name:

List any other names you are known by:

List any other names your spouse is known by:

Date of Birth: _____

Date 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

Citizenship other than Canada? YES NO

If yes, where? _____

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

MARRIAGE INFORMATION:

Please describe your current marital status:

- Single
- Married
- Divorced
- Common Law

If married, please list date & place of marriage:

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

Date & Place of Marriage:

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

Date & Place of Marriage:

Obligations pursuant to previous marriages (ie.
spousal & child maintenance)? YES NO

If yes, please provide details:

Obligations pursuant to previous marriages (ie.
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's name below:

P – from previous marriage (husband/wife)

A – adopted

O – born outside of present marriage

Letter	Full Name	Address	Date of Birth mm/dd/yyyy	Marital Status (MS)

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

If yes to the above question, give details:

Are any of the children 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

PERSONAL REPRESENTATIVE(S):

If your spouse is the sole beneficiary of your Estate, it may be preferable to name him/her as the primary Personal Representative (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 (Joint Personal Representatives), 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(s): _____
Relationship: _____ Age: _____
Address: _____

ALTERNATE GUARDIAN(S)

- 2. Full Name(s): _____
Relationship: _____ Age: _____
Address: _____

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?

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 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 he/she 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 survives you but dies before becoming entitled to receive their entire portion of your Estate?

_____ ½ to my parents and ½ to 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 (check one or both and specify an amount):

1. _____ 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 them for this purpose? _____

2. _____ 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 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 PR to receive compensation for acting on your behalf it is a good idea to specify the dollar amount or percentage of you 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 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 (check one and specify an amount):

_____ 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? _____

Joint Personal Representatives (if applicable):

_____ If you have named Joint PRs to act on your behalf, are they to share the compensation 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 PR(s) 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 the left margin please indicate ownership of assets:

J-owned jointly by husband and wife

H-owned solely by husband

W-owned solely 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:

Financial Institution	Account Type	Account Number	Location

GUARANTEED INVESTMENT CERTIFICATES AND TERM DEPOSITS:

Financial Institution	Account Type	Account Number	Location	Maturity Date

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

Company	Policy Number	Value	Beneficiary

SEGREGATED FUNDS:

Company	Account Number	Value	Beneficiary

PENSION PLANS:

Company	Account Number	Beneficiary

REGISTERED RETIREMENT SAVINGS PLANS AND REGISTERED RETIREMENT INCOME FUNDS:

Financial Institution	Location	Account Number	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.)? – 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:

- | | | |
|---|-----|----|
| 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

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 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:

Thank you for taking the time to complete this Questionnaire.