

WILLS QUESTIONNAIRE
SECTION 1 – FAMILY INFORMATION
PERSONAL INFORMATION

Full Name:

Spouse's 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/cell phone:

Home/cell phone:

Business phone:

Business phone:

Occupation:

Occupation:

Citizenship other than Canada? YES,
NO

Citizenship other than Canada? YES,
NO

If yes,
where?

If yes,
where?

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:	
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Date and place of marriage:		Date and place of marriage:	
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Obligations relating to previous marriages (e.g., spousal & child maintenance)?	YES/NO
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Obligations relating to previous marriages (e.g., spousal & child maintenance)?	YES/NO
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If yes, please provide details:

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If you are single, separated, or divorced:

(a) Do you plan to marry in the near future? Give details:

(b) Do you cohabit (live “common law”) with anyone now? Give details:

(c) If so, when did you start living together?

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

CHILDREN

Number of children: _____

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

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

P - from previous marriage (not adopted by each other unless indicated) (husband/ wife)

A - legally adopted

O - born outside of present marriage /relationship

Letter	Full name	Address	Date of birth	Marital status	Names and ages of their children

Are there any stepchildren, adopted children or children from another relationship of either spouse? YES/NO

Are any of your grandchildren adopted or step grandchildren? YES/NO

If yes to any of the above questions, give details. (For example, if adopted, is the adoption legally finalized? For stepchildren/step grandchildren, do you intend them (or some of them) to be treated equally with biological grandchildren or not? If so, name them.):

Have you stored genetic material? (For example, frozen sperm/eggs/embryo). YES/NO

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

PERSONAL REPRESENTATIVE(S):

Another name for a personal representative used to be “executor.”

If you want your spouse to be the sole beneficiary of your estate, you may also want to name him/her as the primary personal representative (PR). You should also name alternates, in case your first choice is unable to act at the time. Your PR must be an adult (18 years or older). For tax reasons, your PR should be a resident of Canada, and for practical and cost reasons, it is easiest for the PR to be resident in Alberta. If you have more than one PR, we recommend at least one of them is a resident of Alberta. This can be discussed further with your lawyer.

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: _____

BENEFICIARIES:

The following choices for distributing your estate are for your convenience only. It is intended to get you thinking about the issues to be discussed at the meeting 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 is drafted so that your PR holds each child's share in trust until the specified age with power to use income and capital from the trust for that child's education, maintenance and support.

4. If one child dies before you do, or before reaching the age at which he or 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 survive you but die before becoming entitled to receive their entire portion of your estate?

_____ 1/2 to my parents and 1/2 to my spouse's parents

_____ 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 name 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?

_____ At the trustees discretion?

8. PR compensation:

Personal representatives are entitled to be paid for the time, effort and expertise they spend 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.

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 name more than one PR to act on your behalf, is compensation shared 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 appropriate 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.

REAL ESTATE:

Principal Residence: (note - you can only have one principal residence for tax purposes)

Municipal address: _____

Legal description: _____

Name(s) on Title: _____

Ownership: Joint tenancy or Tenancy in common

Other Real Estate:

Municipal address: _____

Legal description: _____

Name(s) on Title: _____

Ownership: Joint tenancy or Tenancy in common

Municipal address: _____

Legal description: _____

Name(s) on Title: _____

Ownership: Joint tenancy or Tenancy in common

Other Land: _____

Interest in mines and minerals:

In the left margin please indicate ownership of assets:

J - owned jointly by husband and wife (or indicate joint owners)

H - owned by husband

W - owned by wife

O - owned by husband and/or wife with some other person (please describe)

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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"), Permanent ("P"), Universal ("U")

Company	Policy no.	Value	Beneficiary

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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.)? - 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

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ANY OTHER ASSETS NOT LISTED ABOVE: (Disability savings plans, tax-free savings accounts, registered education savings, etc.)

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. Do you have any wills for assets outside Canada? YES? NO
4. Have you made any loans or advances to family members or others that are to be repaid? YES/NO

5. 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 & MISCELLANEOUS

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:

It is important that you communicate these arrangements with your family members. Having these in your will is not optimum because the will is generally not consulted until after funeral and memorial arrangements are completed.

OTHER ESTATE PLANNING:

Do you have a previous will? YES/NO

If Yes, please bring a copy in to the meeting with your lawyer.

Do you have an Enduring power of attorney?

Do you have a Personal Directive?