

**WILL INSTRUCTIONS
PERSONAL DATA SHEET**

File No.: _____

Date: _____

Lawyer: _____

Part I. FAMILY INFORMATION

Full Name: _____

Address: _____

Date of Birth: _____ Place of Birth: _____

Telephone No.:

Home: _____

Business: _____

Fax: _____

Occupation: _____

Annual Income: \$ _____

Marital Status: _____

Residence for Income Tax Purposes: _____

Spouse

Full Name: _____

Address: _____

Date of Birth: _____ Place of Birth: _____

Telephone No.:

Home: _____

Business: _____

Fax: _____

Occupation: _____

Annual Income: \$ _____

Marital Status: _____

Residence for Income Tax Purposes: _____

Children

Child Full Name: _____

Date of Birth: _____

Child Full Name: _____

Date of Birth: _____

Child Full Name: _____

Date of Birth: _____

Others to be Named as Beneficiaries, if any:

Name: _____

Address: _____

Relationship: _____

Name: _____

Address: _____

Relationship: _____

Part II. GENERAL

Do you have a will? _____

Does your spouse have a will? _____

Are you presently receiving benefits from an estate or trust? _____

Is so, please give particulars.

Have you set up a trust to benefit another person? _____

Is so, please give particulars.

Do you and your spouse have a marriage contract? _____

If so, please give particulars.

Are you an executor or trustee of any estate? _____

Do you have your own accountant, financial planner and life insurance agent?

Name: _____

Address: _____

Do you own or have an interest in a business? _____

(i.e., sole proprietorship, partnership, limited company)

Provide copies of business agreements. Please provide details on back of this sheet.

Have you been married more than once? _____

If yes, please provide copies of your Judgment for Divorce, Separation Agreement, etc.

Do you have any children from a previous relationship? _____

Part III. ASSETS

Record your assets and those of your spouse, and record the date, cost on acquisition and current value.

1. Automobiles and Boats

(a) Particulars: _____	(b) Particulars: _____
Value: \$ _____	Value: \$ _____
In Whose Name: _____	In Whose Name: _____

2. Approximate value of household goods and contents: \$ _____

3. Real Estate

(a) Location: _____	(b) Location: _____
_____	_____
_____	_____
Value: \$ _____	Value: \$ _____
Original Cost: \$ _____	Original Cost: \$ _____
In Whose Name: _____	In Whose Name: _____

4. Bank Accounts

(a) Name of Bank: _____	(b) Name of Bank: _____
Address: _____	Address: _____
_____	_____
_____	_____
Account No.: _____	Account No.: _____
In Whose Name: _____	In Whose Name: _____
Average Balance: \$ _____	Average Balance: \$ _____

5. Safety Deposit Boxes

(a) Location: _____	(b) Location: _____
Box No.: _____	Box No.: _____

6. **Life Insurance**

(a)	Name of Company: _____	(b)	Name of Company: _____
	_____		_____
	Policy No.: _____		Policy No.: _____
	Type of Plan: _____		Type of Plan: _____
	Beneficiary: _____		Beneficiary: _____
	Value of Benefit: \$ _____		Value of Benefit: \$ _____
	Owned By: _____		Owned By: _____

7. **RRSPs, Pension, Annuities**

(a)	Name: _____	(b)	Name: _____
	Contract No.: _____		Contract No.: _____
	Beneficiary: _____		Beneficiary: _____
	Anticipated Value: \$ _____		Anticipated Value: \$ _____

8. **Investments**

Stocks and/or bonds and their original costs and estimated market values.

9. **Property Outside of Canada**

10. **Other Assets**

Part IV. LIABILITIES

1. **Mortgages Payable by You**

(a)	Amount Owning: \$ _____	(a)	Amount Owning: \$ _____
	Name of Mortgagee: _____		Name of Mortgagee: _____
	_____		_____

2. **Other Debts**

(a)	Amount Owning: \$ _____	(a)	Amount Owning: \$ _____
	Name of Creditor: _____		Name of Creditor: _____
	_____		_____

Part V. SUMMARY

Total Value of Assets: \$ _____
Less: Total Value of Liabilities: \$ _____
Net Value of Your Estate: \$ _____

Part VI. WILL INSTRUCTIONS

1. Do you want a spousal will? _____
(i.e. Do you want everything to go to your spouse if he/she survives you?)

2. If spouse predeceases, who are alternative executors?
 - (i) _____
 - (ii) _____
 - (iii) _____

3. Disposition of household goods, personal effects, jewellery, automobiles, etc.:

4. Disposition of residence and/or cottage: _____

5. Cash legacies: _____

6. Disposition of RRSPs, Annuities, Pensions: _____

7. Residue
 - (i) in trust for children: _____
 - (ii) how old do you want children to be before vesting? _____
 - (iii) one trust or a number of trusts as you have children? _____
 - (iv) what happens if there are no children? _____
 - (v) what happens if there are no grandchildren? _____

8. Are executors to have broad powers for retention, sale, investing of assets, including mutual funds and common trust funds, and if a trust company, investment in own securities, etc.? _____

9. Special clauses to be included:

(a) Appointment of guardians and custodians for children:

Name(s): _____

Address(es): _____

Fee Agreement: _____

Exclude illegitimate children: _____

Family law clauses: _____

(i.e. spouse of beneficiaries not to have claim)

10. Funeral and other special instructions: _____

11. Any other special instructions: _____

Part VII. POWERS OF ATTORNEY

1. Do you wish to have Powers of Attorney prepared? _____

(a) a Continuing Power of Attorney for Property? _____

Who do you want to be your Attorney? (Same as executors in wills - Yes/No)

(b) a Power of Attorney for Personal Care? _____

Who do you want to be your Attorney? (Same as executors in wills - Yes/No)

Do you want to incorporate a living will? (Yes/No) _____

2. Any other special instructions?

