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BARRISTERS & SOLICITORS  
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**CONFIDENTIAL WILLS QUESTIONNAIRE**

**SECTION 1: PERSONAL AND FAMILY INFORMATION**

**1.1 TESTATOR (PERSON MAKING WILL)**

FULL NAME: \_\_\_\_\_

VARIATIONS OR NICKNAMES: \_\_\_\_\_

RESIDENTIAL ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

BUSINESS: \_\_\_\_\_

BUSINESS ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

BIRTH PLACE: \_\_\_\_\_

BIRTH DATE: \_\_\_\_\_

**MARITAL STATUS**

1.  IF MARRIED

PLACE OF MARRIAGE: \_\_\_\_\_

PREVIOUS MARITAL STATUS:

- SINGLE
- DIVORCED
- WIDOWED

2.  IF SINGLE

PREVIOUS MARITAL STATUS:

- DIVORCED
- WIDOWED

**1.2 SPOUSE**

- SPOUSE
- LIVING MATE

FULL NAME: \_\_\_\_\_

RESIDENTIAL ADDRESS:

- SAME AS ABOVE

OR:  
\_\_\_\_\_

PHONE: \_\_\_\_\_

BUSINESS ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

BIRTH PLACE: \_\_\_\_\_

BIRTH DATE: \_\_\_\_\_

(D)(M)(Y)

DO THE SPOUSES WISH TO MAKE THE SAME OR VERY SIMILAR WILLS:

- YES
- NO

ARE THERE ANY MARRIAGE CONTRACTS, DIVORCE SETTLEMENTS, OR OTHER RESTRICTIONS ON TESTAMENTARY FREEDOM?:

- NO
- YES: PLEASE DESCRIBE: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**1.3 CHILDREN AND DEPENDANTS**

NAME	AGE	REMARKS*

\* NOTE: **Adopted children** – please indicate with an “A” in the remarks column.  
**Step children** – please indicate with an “S” in the remarks column.  
**Disabled children** – please indicate with a “D” in the remarks column.  
**Children not living with Testator** – please indicate with a “B” in the remarks column. Please advise with\ whom these children reside.

FURTHER REMARKS:

**1.4 OTHER DEPENDANTS** (E.G. MOTHER, FATHER, ETC.)

NAME	ADDRESS	RELATION TO TESTATOR	AGE

**SECTION 2: GENERAL WILL CONSIDERATIONS****2.1 APPOINTMENT OF EXECUTORS**

NAME(S): \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

OCCUPATION(S): \_\_\_\_\_

RELATIONSHIP TO TESTATOR: \_\_\_\_\_

ALTERNATES (not required but recommended): \_\_\_\_\_

**2.2 EXECUTORS POWERS**

	YES	NO	?
1 Broad power to choose investments?			
2 Trustee allowed to buy property from Estate?			
3 Continue Business as required?			
4 Use capital for education & maintenance of children?			
5 Deal with real property? (lease, rent, mortgage, etc.?)			
6 Settle Claims?			
7 Borrow Money?			
8 Other powers you wish trustee to have? State below			

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**2.3 GUARDIANS**

NAME(S): \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

RELATIONSHIP TO TESTATOR: \_\_\_\_\_

ALTERNATES (not required) :

NAME(S): \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

RELATIONSHIP TO TESTATOR: \_\_\_\_\_

**2.4 DISPOSITION OF REMAINS**

Please indicate any special provisions that you wish to make. For example, burial, cremation, donation of organs to science or for transplants etc...

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2.5 PREVIOUS WILLS**

Have you made any other previous wills?

YES

NO

LOCATION: \_\_\_\_\_

**SECTION 3: DISPOSITION OF ESTATE**

**3.1 ENTIRE ESTATE TO SPOUSE IF SURVIVING**

YES

OR STATE BELOW:

\_\_\_\_\_  
\_\_\_\_\_

**3.2 IF SPOUSE DIES AT SAME TIME OR PREDECEASES**

IN TRUST FOR CHILDREN UNTIL EACH CHILD REACHES THE AGE OF \_\_\_\_\_

OTHER:

\_\_\_\_\_  
\_\_\_\_\_

IF CHILDREN PREDECEASED OR DIE BEFORE ATTAINING QUALIFYING AGE, IS THEIR SHARE TO GO TO THEIR CHILDREN?

OUTRIGHT TO THOSE GRANDCHILDREN, OR STATE TRUSTS BELOW:

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**3.3 IF SPOUSE AND ALL CHILDREN/GRANDCHILDREN HAVE DIED WHEN TESTATOR DIES, ESTATE TO GO TO:**

NAME	ADDRESS	RELATION TO TESTATOR

\*NOTE: PLEASE CHECK WITH CHARITIES FOR PROPER DESCRIPTION IF WISHING TO BENEFIT.

**3.4 SPECIAL GIFTS**

- SPECIAL PERSONAL PROPERTY, SPECIFIC CASH GIFTS AS STATED BELOW.
- IN ANY EVENT (I.E. WHETHER SPOUSE SURVIVES OR NOT).
- ONLY IF SPECIFIC EVENT OCCURS, AS STATED BELOW.

NAME	ADDRESS	RELATION	Circumstance	ITEM DESCRIPTION/ AMOUNT

SPECIFIC EVENT: \_\_\_\_\_  
 \_\_\_\_\_

**SECTION 4: DESCRIPTION OF ASSETS AND LIABILITIES**

**4.1 BANK ACCOUNTS OR OTHER LIKE ASSETS READILY CONVERTIBLE TO CASH**

BANK & BRANCH	ACCOUNT NO.	TYPE	REMARKS

\*NOTE: PLEASE INDICATE IF THE ACCOUNT IS JOINT WITH ANOTHER PERSON BY PLACING A "J" IN THE REMARKS COLUMN.

**4.2 STOCKS, BONDS AND CERTIFICATES OF INVESTMENT**

PLEASE ATTACH LIST IF THERE IS INSUFFICIENT SPACE.

NAME OF COMPANY	NUMBER HELD & VALUE	REMARKS

**4.3 LIFE INSURANCE**

ISSUING COMPANY	POLICY AMOUNT	BENEFICIARY	REMARKS

\*NOTE: PLEASE INDICATE IF IT IS A GROUP POLICY BY PLACING A "G" IN THE REMARKS COLUMN.

EMPLOYMENT  
OR OTHER GROUP (DESCRIBE BELOW):

\_\_\_\_\_

**4.4 PENSION FUNDS (including RRSP's, RHOSP's and other plans or annuities)**

INSTITUTION PLACED WITH	APPROX AMOUNT	TYPE	BENEFICIARY

**4.5 REAL ESTATE**

SAME AS RESIDENTIAL

MUNICIPAL ADDRESS: \_\_\_\_\_

LEGAL DESCRIPTION: \_\_\_\_\_

VALUE: \_\_\_\_\_

MORTGAGE HELD BY: \_\_\_\_\_

JOINT TITLE: \_\_\_\_\_

**4.6 COMPANY/PARTNERSHIP/OWNED or partially owned by Testator**

NAME	REGISTERED OFFICE OR PLACE OF BUSINESS	INTEREST HELD

AND BUY/SELL AGREEMENT IN EFFECT?: \_\_\_\_\_

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**4.7 AUTOMOBILES AND SPECIAL PERSONAL PROPERTY**

(art work, jewellery, family heirloom)

TYPE OR DESCRIPTION	VALUE	LOAN HELD BY