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Barrister & Solicitor

PART I - FAMILY INFORMATION

Date:

1. Full name:
2. Also known as:
3. Birthdate:
4. Partner's name:
5. Also known as:
6. Birthdate:
7. Address:
8. Phone (home):
9. Phone (business):
10. Email:
11. Residence for income tax purposes:
12. Marital status:
 - (a) Married
 - (b) Separated
 - (c) Divorced
 - (d) Contemplating marriage
 - (e) Common law
 - (f) Widowed
 - (g) Single

Children:

- | | |
|---------------|---------------|
| 1.
Address | 2.
Address |
| 3.
Address | 4.
Address |
| 5.
Address | 6.
Address |

Those who you would like to leave gifts to:

1.
Address

2.
Address

3.
Address

4.
Address

5.
Address

6.
Address

3. Do you have your own accountant or life insurance agent?

Name:
Name:

Address:
Address:

PART II ASSETS

1. Automobiles and boats

Item:
Value:
In whose name:

Item:
Value:
In whose name:

Item:
Value:
In whose name:

Item:
Value:
In whose name:

2. Approximate value of household goods and contents:

3. Real estate

Location:
Value:
Original cost:
In whose name:

Location:
Value:
Original cost:
In whose name:

Location:
Value:
Original cost:
In whose name:

Location:
Value:
Original cost:
In whose name:

4. Bank accounts

Name of bank:
Address of bank:
Account number:
In whose name:
Average balance:

Name of bank:
Address of bank:
Account number:
In whose name:
Average balance:

Name of bank:
Address of bank:
Account number:
In whose name:
Average balance:

Name of bank:
Address of bank:
Account number:
In whose name:
Average balance:

5. Safety deposit box

Location:
Box number:

6. Life insurance

Name of company:
Policy number:
Type of plan:
Named beneficiary:
Value to your estate:

Name of company:
Policy number:
Type of plan:
Named beneficiary:
Value to your estate:

7. RRSPs, RIFs, pensions and annuities

Name:
Contract number:
Named beneficiary:
Value to your estate:

Name:
Contract number:
Named beneficiary:
Value to your estate:

8. Investments

List all stocks and/or bonds and their original costs and estimated market values:

PART III LIABILITIES

1. Mortgages payable by you

Amount owing:
Name of mortgagee:

Amount owing:
Name of mortgagee:

2. Other debts

Amount owing:
Name of creditor:

Amount owing:
Name of creditor:

Amount owing:
Name of creditor:

Amount owing:
Name of creditor:

PART IV WILL INSTRUCTIONS

1. Executor of Estate:

Address:

Alternate:

Address:

2. Guardian of Children:

Address:

Alternate:

Address:

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

4. Disposition of residence and/or cottage:

5. Cash legacies:

	Name	Relationship	Age	Amount
1.				
2.				
3.				
4.				
5.				
6.				

Charitable Gifts:

6. Disposition of RRSPs, RIFs, annuities, pensions:

7. Disposition of Life Insurance:

Trust for children as per will:

8. Disposition of residue (including trust for spouse and/or minors, payments of income from trust, payment of capital from trust, time of distribution of trust, provision should any beneficiaries predecease, etc.):

Trusts for minor beneficiaries? →

Disposition at what age? →

What if the entire family predeceases and no beneficiaries are alive?

9. Funeral and other special instructions:

10. Do you wish to have a general financial power of attorney?

Name and address of your attorney(s):

Alternate:

11. Do you wish to have a continuing power of attorney for health care?

Name and address of your attorney(s):

Alternate:

Instructions: lose consciousness, no possibility of regaining same, life maintained by artificial means → Do you want to be kept alive

- 1) Do you want your heart to be started mechanically when stopped
- 2) Feeding tube if paralyzed
- 3) Mechanical respiration by machine when brain is dead.