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INFORMATION SHEET - WILLS AND ESTATES

These sheets will assist you in gathering the information necessary for the preparation of your Will. All information provided is confidential and will be kept strictly between the solicitor and the client. **Please be as precise as possible.** If you need more space for any questions, use the back of the sheet on which the question appears. If you have any questions of your own, list them on the separate sheet attached and I will be pleased to discuss them fully at your appointment. Do not be put off by the length of this questionnaire - many of the questions may have no application to your circumstances and can be ignored. ***Please use one questionnaire form for husband/wife wills that are to be the same.***

PERSONAL AND FAMILY INFORMATION

1. Please print your full names in block letters and include all other names by which you are known.

LAST NAME	FIRST NAME	MIDDLE NAME
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OTHER NAMES BY WHICH YOU MAY BE KNOWN

Date of Birth: _____

Occupation: _____

SPOUSE'S INFORMATION:

LAST NAME	FIRST NAME	MIDDLE NAME
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OTHER NAMES BY WHICH YOU MAY BE KNOWN

Date of Birth: _____

Occupation: _____

2. Address: _____
Number and Street

City/Town

Province Postal Code

3. Telephone Numbers:
(Please provide numbers which would be most convenient to reach you at)

Residence Business or Cell

4. Marital Status (check one only): Single _____, Married _____,
Divorced _____, Separated _____, Widowed _____, About to Wed _____

If Married:
Place of residence at time of marriage: _____
Date of marriage: _____

5. Previous marriages: Yes _____, No _____

If yes, name of previous spouse: _____
Date and Place of separation, divorce or death:

Date: _____ Place: _____

Any marriage contracts or separation agreements: Yes _____, No _____
(Eg: spousal and/or child maintenance orders in place)

If single, separated or divorced:

(A) Are you now cohabiting with anyone? Yes _____, No _____
If yes, name of person: _____

(B) If about to wed:
Are you planning to marry in the near future? Yes _____, No _____

6. Please list all Children (including illegitimate, adopted, or stepchildren):

Names of Children (in full)

Birth Dates

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

7. Are you responsible for any mentally or physically children, grandchildren or dependent (persons wholly or partially dependent on you, financially or otherwise): adults? Yes _____, No _____

Names (in full)

Birth Dates

_____	_____
_____	_____

How do you wish them to be provided for?

8. Name of Guardian(s) for Minors(under 18) or Dependent Children:
If yes, provide full name(s), address, age, occupation and relationship.

9. Alternate Guardian(s)
If yes, provide full name(s), address, age, occupation and relationship.

10. Have all the Guardians been asked if they are willing to act?

Yes _____, No _____

FINANCIAL INFORMATION

1. Do you own any property located outside of the Province of Alberta? Yes / No
If yes, what property and where:

2. Is your insurance policy consistent with the directions in your will?
Yes _____, No _____

INSTRUCTIONS FOR WILL

1. Are husband and wife Wills to be the same? Yes _____, No _____
If no, please explain:

2. Who do you wish to be the Executor(s) of your Will? (An Executor is the person who would apply for probate of your Will (if necessary), sell assets, pay all lawful debts, and distribute the balance of assets among the beneficiaries named in your Will. Ideally, your Executor should be younger than you, a resident of Alberta, possess good judgment and be trustworthy. **(Husband/wife is normally the first choice for Executor. Please indicate if you would like your spouse to be your primary Executor.)**

Executor Name	Relationship
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Executor's Address

3. Your Husband/Wife can be the sole Executor/Executrix of your Estate, however you should have an alternative Executor as well. It is recommended that Husband and Wife name the same person(s) as alternate Executor.

Alternate Executor Name	Relationship
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Alternate Executor's Address

4. Specific Bequests: Should be avoided unless it is felt to be absolutely necessary, **as there is a risk that the property gifted or the person receiving the gift will not exist at the time of your death.** However, if you wish to give a specific sum of money (or an heirloom such as an engagement and wedding ring) to a particular person(s) state the name(s), address, his or her relationship to you and the sum of money or article(s) the person(s) is/are to receive:

ISSUES TO CONSIDER WHEN PLANNING YOUR WILLS

1. All to spouse: Yes / No Other: _____

If spouse predeceases me:

_____ Equally to all my children.

_____ All to children but different percentages. (Specify)

_____ Other (Specify)

2. At what age are your children to receive their share of your estate?

_____ all at age 18 or 21;

_____ other _____

3. If any children predecease you, or die before attaining the age at which they would be entitled to their share, who shall receive that share or the amount remaining?

_____ the child's estate

_____ the children of the deceased child (my grandchildren)

_____ my surviving children only

_____ other

FAMILY DEMISE

- 1. How is your estate to be divided if you and your spouse and all your children and grandchildren are killed in a common accident? (Eg, parents and spouse's parents, brothers and sisters and spouse's brothers and sisters, nieces and nephews, charities, other.)

- 2. Maintenance and Education Clause for Dependent Children – Do you wish to have an encroachment clause for your dependent child or children in order to enable the Trustee to draw upon the monies for such things as maintenance, education, benefit and advancement? Yes / No

Where will you be storing your Will(s) and any other estate documents (Personal Directive, Power of Attorney) for safe keeping? (Some examples are: Lawyer's office, bank safety deposit box, safe) ***Please note there is only one original Will document executed per person***

Name and location of Bank: _____

If other please specify: _____

Other documents you wish us to prepare:

____ Enduring Power of Attorney ____ Personal Directive

NOTES AND QUESTIONS
