

**ESTATE PLANNING QUESTIONNAIRE
PERSONAL INFORMATION**

SECTION 1 – FAMILY INFORMATION		
Personal Information (Individual 1)		
Name:		
Home Phone:	Cell Phone:	Work Phone:
Current address:		
City:	Province:	Postal Code:
Date of birth:	Place of Birth:	Citizenship:
Personal Information (Individual 2 – Spouse or Common Law of Individual 1)		
Name:		
Date of birth:	Place of Birth:	Citizenship:
Relationship Information (Status is Married or Common Law)		
Status:	If other, please explain:	
Date and Place of Marriage: If Common Law, how long:		
Individual 1		
Any previous marriages/common laws:		
If yes, name of previous spouse(s)/common law and date of death/divorce/separation		
Name	Event	Date
1)		
2)		
Any obligations pursuant to previous relationships (child or spousal support obligations)?		
Individual 2		
Any previous marriages/common laws:		
If yes, name of previous spouse(s)/common law and date of death/divorce/separation		
Name	Event	Date
Any support obligations pursuant to previous relationship (child or spousal support obligations)?		

Children (Attach a separate sheet if necessary)

Number of Children:

1	Name (first, middle, last)			(Grand) Children	
				Name	Age
	Date of Birth	Age	From _____ relationship		
				Present or prior	
	Marital Status			Telephone:	
	Married/Single/Divorced			Telephone:	
	Address				

2	Name (first, middle, last)			(Grand) Children	
				Name	Age
	Date of Birth	Age	From _____ relationship		
				Present or prior	
	Marital Status			Telephone:	
	Married/Single/Divorced			Telephone:	
	Address				

3	Name (first, middle, last)			(Grand) Children	
				Name	Age
	Date of Birth	Age	From _____ relationship		
				Present or prior	
	Marital Status			Telephone:	
	Married/Single/Divorced			Telephone:	
	Address				

Children and Grandchildren – Further Information

Are you responsible for any other children? (If so, please give details)

Are any of the children or grandchildren mentally or physically incapacitated? (If so, please give details)

Are you responsible for any dependent adults who are incapable of managing their own affairs? (If so, please explain)

Advancements to Children

Have you ever given, loaned or transferred any money or property to any of your children?

SECTION 2 – CURRENT ASSETS

REAL ESTATE

Residence	Owned : YES <input type="checkbox"/> No <input type="checkbox"/>	Date of Purchase:	
Address:	Jointly Held: YES <input type="checkbox"/> No <input type="checkbox"/>	Present Estimated Value:	
		Mortgaged: YES <input type="checkbox"/> No <input type="checkbox"/>	Mortgage life insured: YES <input type="checkbox"/> No <input type="checkbox"/>
Other Properties Owned? If yes, attach separate sheet detailing properties	YES <input type="checkbox"/> No <input type="checkbox"/>	Financial Institute:	

BANKING

Name of Bank:		Name of Bank:	
Location:		Location:	
Account type:		Account type:	
Jointly held?:		Jointly held?:	
Value:		Value:	
Name of Bank:		Name of Bank:	
Location:		Location:	
Account type:		Account type:	
Jointly held?:		Jointly held?:	
Value:		Value:	

Safety Deposit Box?

PENSION PLANS, LIRAS, LIFS

Company:		Company:	
Death Benefit/ Survivors' Benefits available?		Death Benefit/ Survivors' Benefits available?:	
Value:		Value:	
Beneficiary:		Beneficiary:	
Contingent Beneficiary:		Contingent Beneficiary:	

LIFE INSURANCE

Company:		Company:	
Value:		Value:	
Beneficiary:		Beneficiary:	
Contingent Beneficiary:		Contingent Beneficiary:	
Company:		Company:	
Value:		Value:	
Beneficiary:		Beneficiary:	
Contingent Beneficiary:		Contingent Beneficiary:	

RRSPS, RRIFs, RESPS			
Company:		Company:	
Value:		Value:	
Beneficiary:		Beneficiary:	
Contingent Beneficiary		Contingent Beneficiary	
Company:		Company:	
Value:		Value:	
Beneficiary:		Beneficiary:	
Contingent Beneficiary		Contingent Beneficiary	
INVESTMENTS			
	Nature of investment	Approx. value:	
Stocks & Shares in public companies			
Savings Bonds, Bonds, GICs & term deposits			
INTERESTS IN PRIVATE COMPANIES			
Company Name:	Shares:	Approx. value:	
OTHER ASSETS (VEHICLES, ART, JEWELRY ETC.)			
Specify:		Approx. value:	

SECTION 3 – INSTRUCTIONS FOR WILL			
		Do you have a Will/Personal Directive/Power of Attorney?	
Individual 1			
Individual 2			
Personal Representative(s)/Executor(s)			
Notes:	<ul style="list-style-type: none"> • If your spouse/common law is the sole beneficiary of your estate, it may be preferable to name him/her as the primary executor. • One primary and one alternate executor will likely be sufficient, depending upon your circumstances. It is possible to appoint joint executors, but problems may arise if joint executors cannot agree. • Your executor must be 18 years or older, and must be competent. • For tax reasons, it is not advisable to choose an executor who resides outside of Canada. • At least one executor should be a resident of Alberta, particularly where beneficiaries are under the age of 18. • You should be sure to ask your executor(s) if they are willing to act. 		
	Primary Executor(s)		
	Full name:		
	Relationship:		Age:
	City:	Province:	
	Alternate Executor(s)		
Full name:			
Relationship:		Age:	
City:	Province:		
Guardians for Minor Children			
Primary Guardian(s)			
Full name:			
Relationship:		Age:	
City:	Province:		
If married couple/spouses, what if no longer together at the time of your death?			
Alternate Guardian(s)			
Full name:			
Relationship:		Age:	
City:	Province:		
If married couple/spouses, what if no longer together at the time of your death?			
Further Information			
Is there anyone that you wouldn't want to be guardian? (if so, please provide name, relationship to the children, and explain why)			

Distribution of Estate		
Notes:	<ul style="list-style-type: none"> • Only items that you will own at the time of your death should be specifically gifted. • Automobiles and other equipment should probably not be specifically gifted, as you will likely sell or trade them before the time of your death. • Other non-valuable items can be listed in an inventory where you indicate what you would like done with your property. This would be appropriate for inexpensive jewelry, furniture, vehicles and other household items. This inventory can be updated by you, without any legal expense. Your executor should know where you keep this inventory. You should not sign your inventory. • You do not have to make any specific gifts; you may wish to leave all your estate to your spouse or children (skip to gift residue). • The age of majority in Alberta is 18; unless specified otherwise, your Will shall provide that your Executor will hold each minor's share in trust, with the power to pay sums (from the income and capital) to the guardian for education, maintenance and support, until the minor reaches 18. 	
Name of Beneficiary/Charity	Gift	Age of Distribution:
Name of Beneficiary/Charity	Gift	Age of Distribution:
Name of Beneficiary/Charity	Gift	Age of Distribution:
Name of Beneficiary/Charity	Gift	Age of Distribution
Name of Beneficiary/Charity	Gift	Age of Distribution
Name of Beneficiary/Charity	Gift	Age of Distribution
Gift of Residue		
Notes:	<ul style="list-style-type: none"> • The residue of your Estate is the amount remaining to be distributed after all Estate debts, expenses, taxes are paid and specific gifts are made. • You should make a primary gift or gifts of the residue, you should also make an alternate gift in case the primary beneficiary(ies) have predeceased you. 	
The following choices are for your convenience only. A full discussion with your lawyer will be necessary to ensure that your legal obligations to any dependants are fulfilled and that your intentions are reflected to the fullest extent possible.		
Residue to spouse?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If spouse predecease/no spouse residue to children?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Equally? <input type="checkbox"/> Yes <input type="checkbox"/> No	Age of Distribution	
If no children/children predecease residue to grandchildren?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Equally? <input type="checkbox"/> Yes <input type="checkbox"/> No	Age of Distribution:	
If no grandchildren, residue to surviving children?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Family Disaster

If no spouse, children or grandchildren alive at time of death or distribution:

Details of Beneficiaries

Please complete this section for any beneficiaries who are not already described in this questionnaire (i.e. those other than your spouse and children).

1		2	
Full name:		Full name:	
Relationship:	Age:	Relationship:	Age:
City:	Province:	City:	Province:
3		4	
Full name:		Full name:	
Relationship:	Age:	Relationship:	Age:
City:	Province:	City:	Province:

Power of Attorney

Notes:	<ul style="list-style-type: none"> • It may be preferable to name a spouse as the primary attorney. • One primary and one alternate attorney will likely be sufficient, depending upon your circumstances. It is possible to appoint joint attorneys, but problems may arise if joint attorneys cannot agree. • Your attorney must be 18 years or older, and must be competent. • At least one attorney should be a resident of Alberta. • You should be sure to ask your attorney(s) if they are willing to act.
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Primary Attorney(s)

Full name:	Relationship:	
Phone #	City:	Province:

Alternate Attorney(s)

Full name:	Relationship:	
Phone #	City:	Province:

Personal Directive

Notes:	<ul style="list-style-type: none"> • It may be preferable to name a spouse as a primary agent. • One primary and one alternate agent will likely be sufficient, depending upon your circumstances. It is possible to appoint joint agents, but problems may arise if joint agents cannot agree. • Your agent must be 18 years or older, and must be competent. • At least one agent should be a resident of Alberta. • You should be sure to ask your agent(s) if they are willing to act.
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Primary Agent(s)

Full name:	Relationship:	
Phone #	City:	Province:

Alternate Agent(s)

Full name:	Relationship:	
Phone #	City:	Province: