

**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:

Any support 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 relationships (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          Prior		
	Marital Status:			Telephone:	
	Married      Single      Divorced				
Address:					
2	Name (first, middle, last):			(Grand) Children:	
				Name:	Age:
	Date of Birth:	Age:	From _____ relationship:		
			Present          Prior		
	Marital Status:			Telephone:	
	Married      Single      Divorced				
Address:					
3	Name (first, middle, last):			(Grand) Children:	
				Name:	Age:
	Date of Birth:	Age:	From _____ relationship:		
			Present          Prior		
	Marital Status:			Telephone:	
	Married      Single      Divorced				
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 give details)

**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	No	Date of Purchase:	
Address:	Jointly Held:	Yes	No	Present Estimated Value:	
				Mortgaged:	Mortgage life insured:
Other Properties Owned? If yes, attach separate sheet detailing properties	Yes	No		Yes	No
				Financial Institution:	

### 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:	Approximate Value:
Stocks & Shares in public companies		
Savings Bonds, Bonds, GICs & term deposits		

**Interests in Private Companies**

Company Name:	Shares:	Approximate Value:

**Other Assets (vehicles, art, jewelry, etc.)**

Specify:	Approximate Value:

## SECTION 3 – INSTRUCTIONS FOR WILL

Do you have a:	Will?		Personal Directive?		Power of Attorney?	
Individual 1	Yes	No	Yes	No	Yes	No
Individual 2	Yes	No	Yes	No	Yes	No

### Personal Representative(s) / Executor(s)

Notes:	<ul style="list-style-type: none"> <li>• If your spouse/common law is the sole beneficiary of your estate, it may be preferable to name him/her as the primary executor.</li> <li>• 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.</li> <li>• Your executor must be 18 years or older, and must be competent.</li> <li>• For tax reasons, it is not advisable to choose an executor who resides outside of Canada.</li> <li>• At least one executor should be a resident of Alberta, particularly where beneficiaries are under the age of 18.</li> <li>• You should be sure to ask your executor(s) if they are willing to act.</li> </ul>
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### Primary Executor(s)

Full Name:					
Relationship:				Age:	
City:		Province:			

### Alternate Executor(s)

Full Name:					
Relationship:				Age:	
City:		Province:			

### Guardians for Minor Children

Full Name:					
Relationship:				Age:	
City:		Province:			

If married couple/spouses, what if no longer together at the time of your death?

### Guardians for Minor Children

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 you wouldn't want to be guardian? (if so, please provide name, relationship to the children, and explain why)

## Distribution of Estate

**Notes:**

- 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:

## Gift of Residue

**Notes:**

- 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?	Yes	No	
If spouse predecease or no spouse, residue to children?	Yes	No	
Equally?	Yes	No	Age of Distribution
If no children or children predecease, residue to grandchildren?	Yes	No	
Equally?	Yes	No	Age of Distribution
If no grandchildren, residue to surviving children?	Yes	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:**

- 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.

### Primary Attorney(s)

Full Name:		Relationship:	
Phone Number:	City:	Province:	

### Alternate Attorney(s)

Full Name:		Relationship:	
Phone Number:	City:	Province:	

## PERSONAL DIRECTIVE

**Notes:**

- It may be preferable to name a spouse as the 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.

### Primary Agent(s)

Full Name:		Relationship:	
Phone Number:	City:	Province:	

### Alternate Agent(s)

Full Name:		Relationship:	
Phone Number:	City:	Province:	