

## WILL PREPARATION CHECKLIST

### PERSONAL INFORMATION

Full legal name
Any nicknames
Date of birth
Place of birth
Social Insurance Number
Occupation
Employer
Home address
Home phone number
Business phone number
Citizenship

## **MARITAL STATUS**

Marital status

Date of marriage

Is there a marriage contract or cohabitation agreement?

Is there a previous marriage by either spouse?

Are there children by a previous marriage?

Are there ongoing financial obligations to a previous spouse?

Are there ongoing financial obligations to children of a previous marriage?

## **SPOUSE**

Full legal name

Any nicknames

Date of birth

Place of birth

Social Insurance Number

Occupation

Employer

Home address

Home phone number

Business phone number

Citizenship

## CHILDREN

Name	Age	Status*

\* Adopted, child of previous marriage, etc.

## ASSETS AND LIABILITIES

Please attach Net Worth Statement, showing ownership and current market value of all assets, as well as current liabilities.

## BENEFICIARY DESIGNATIONS

List below any assets that have a designated beneficiary, i.e. RRSPs, pension plans, as well as life insurance contracts.

Asset	Beneficiary	Value

**PROPOSED DISTRIBUTION OF ESTATE**

**Legacies or Special Bequests:**

Amount or Item	Beneficiary	Relationship	Minor

**Personal Effects and Household Items:**

Amount or Item	Beneficiary	Relationship	Minor

**Residue:**

Beneficiary	Relationship	Minor	Outright / In Trust

**PRIMARY EXECUTOR**

Name
Address
Relationship
Occupation
Home Phone Number
Business Phone Number

**ALTERNATE EXECUTOR**

Name
Address
Relationship
Occupation
Home Phone Number
Business Phone Number

**PRIMARY GUARDIAN OF MINOR CHILDREN**

Name
Address
Relationship
Occupation
Home Phone Number
Business Phone Number

**ALTERNATE GUARDIAN OF MINOR CHILDREN**

Name
Address
Relationship
Occupation
Home Phone Number
Business Phone Number