

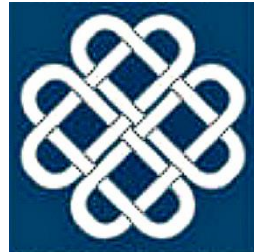
BUTLER WILLS AND ESTATES CONSULTING SERVICES
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Please review this questionnaire before your appointment. It is helpful for gathering your thoughts, and thinking about your estate as a whole picture. It is intended to help you get started, rather than provide a complete understanding of your wishes. Feel free to leave any sections that don't apply or that you aren't sure how to answer, as Lynne Butler will go through everything with you in your appointment. Please note that this questionnaire is not equivalent to a will.

SECTION 1 - GENERAL INFORMATION

Full Name: _____

Date of Birth: _____ Age: _____

Mailing Address: _____

Phone Number: Home - _____ Work/Cell - _____

Email address _____

Marital Status _____

CHILDREN, DEPENDENTS, AND TRUSTS

Please note this includes adult and dependent children.

Are any of your children from a previous marriage? No (☐); If yes, specify:

Are any of your children/beneficiaries physically or mentally challenged? If so, who:

PERSONAL REPRESENTATIVES (Executor)

You may have more than one executor and you should have an alternate.

1st Choice _____ Relationship: _____

Alternate _____ Relationship: _____

CUSTODY OF MINOR CHILDREN

I will appoint the following persons to have *guardianship* of my minor children:

1st choice: _____ Relationship: _____

Alternate: _____ Relationship: _____

SECTION 2 - DISPOSITION OF ESTATE

RRSP/RRIF Please check your RRSP, RRIF, & Pension Fund designations before our meeting. You do not need to bring a copy.

Do you have Registered Pension Plans or Deferred Profit Sharing Plans?

YES (☐) NO (☐) If yes, beneficiary: _____

LIFE INSURANCE Please check your life insurance amounts and designations before our meeting.

Do you have a life insurance policy? YES (☐) NO (☐)

JOINTLY OWNED ASSETS

If your spouse survives you, do you intend for him/her to own your jointly owned assets? Yes (☐) No (☐)

For any assets that are jointly held with someone other than your spouse/partner, please list assets & co-owner:

REAL ESTATE

Principal Residence Address:

In whose name(s) is/are this property registered?

Are there any mortgages? YES ☐ NO ☐

Are the mortgages life insured? YES ☐ NO ☐

PERSONAL PROPERTY

☐ **Memorandum of Personal Effects.** I will provide a list of gifts to go in my Will before I sign the Will. *We have a template Memorandum that you may use if you wish.*

Conflicts. Consider how conflicts over the distribution of personal items to children are to be settled e.g. Rotating choice – oldest first, Executor's discretion, etc.

Non-Registered Investments

Do you own any non-RRSP/RRIF investments? Yes ☐ No ☐

In whose name(s) are they registered?

Business Interests: Do you have any business interests? YES ☐ NO ☐

If YES, please specify

GENERAL DISTRIBUTION:

After payment of my obligations, I would like the rest of my estate to go to: *Please check all that apply.*

My spouse/partner _____ My children _____ My grandchildren _____

A charity _____ Other relatives _____

Past gifts? Have you already made gifts to children or others that should be taken into account in this Will? No () Yes ()

If YES, would you like those gifts to be forgiven in your will? YES () NO ()

SECTION 3 – OTHER CONSIDERATIONS

1. **Existing Will.** Do you have a Will now?
2. **Values.** We do not need to know any specific dollar amounts. As long as you have a general idea of your assets and debts (e.g. approximately how much your house is worth) you will be ready for your estate planning.
3. **Caution – Lost Wills.** If your Will is lost while in your possession the law presumes you revoked it. Keep it in secure storage outside your home (e.g. safety deposit box at the bank) or in a fire- and water-proof safe in your home.
4. **Gifts before your death.** You may give away any of the items you have specified as gifts in your Will before your death without restriction. These gifts will not be effective at your death – they “adeem”.
5. **Alternate beneficiaries.** If a beneficiary dies before you, his/her gift “lapses” unless you specify an alternative beneficiary. You should consider alternate gifts.
6. **Final arrangements.** Make sure you discuss your wishes about final arrangements (i.e. funeral, burial, cremation etc.) with your family members. Consider preparing a memo setting out your preferences for them to use as a guide. You may include these instructions in your will. It will not be legally binding, but it is helpful for your executor to know what your wishes are.