



**BARRISTERS & SOLICITORS
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Estate Questionnaire

Section One – Family Information

1. <u>Personal Information</u>	
Full Name:	Other Names Known By:
Date of Birth:	Place of Birth:
Occupation:	Annual Income:
Residential Address:	Citizenship:
Telephone:	Email Address:

2. <u>Marital Information</u>	
Marital Status:	Previous Marriage by Either Spouse?
Spouse's Name:	If Yes, which spouse?
Are you cohabitating with anyone?	Date and Place of Divorce:
Is there a marriage contract or domestic contract? (If so, please provide a copy)	Name of Previous Spouse:

3. <u>Children</u>	
Children of Present Marriage: (Please include name, gender, and birth day)	Children of Previous Marriage: (Please include name, gender, age, and birth day)
Are any children not mentioned because there is no intention to benefit or because they were born outside of marriage or adopted?	Are any children non-residents of Canada?
Have any children predeceased you? (Please provide date of death and names of their children, if any)	Are any of the children disabled? (If yes, please provide name and nature of disability)

4. <u>Support Obligations</u>	
Any dependant children or legal obligations to support a child? (Please provide dependant's name, birth day, and nature of support)	Any dependant spouses or legal obligations to support another adult? (Please provide dependant's name, birth day, and nature of support)

5. <u>Existing Estate Documents</u>	
Is there a previous Will? (If so, please provide a copy)	Does your spouse have a Will?

Section Two – Asset Information

1. <u>Real Estate</u>	
House (in whose name and how it is held ie. joint tenants or tenants in common) :	Current Value of House:
Value of Mortgage, if any:	Is this a matrimonial home?
Any other real property (in whose name and how is it held):	Current value of other property:
Mortgages on other property, if any:	Any real property located outside of Ontario?

2. <u>Personal Items</u>	
Approximate value of household items:	Approximate value of vehicles, boats, etc.:
Special collections, if any (include, type value, and who purchased):	Any heirlooms, artwork, jewellery etc of special note?

3. <u>Investments</u>		
<i>Nature of Investment:</i>	<i>Date Purchased:</i>	<i>Approximate Value:</i>
Any stocks or shares in public company?		
Any Canada Savings Bonds?		
Any other Bonds, GICs or Term Deposits?		
Any other non-registered investments?		
Do you have an investment advisor? If so, please provide their contact information:		

4. <u>Registered Investments</u>		
<i>Nature of Investment and Issuing Company:</i>	<i>Approximate Value:</i>	<i>Named Beneficiary</i>
Any Pension Plans?		
Any RRSPs?		

Any RIFs?		
CPP?		
Are you a registered plan holder for an RDSP?		
If your spouse elects under their statutory entitlement for an equal division of property, will any of the above named beneficiaries change?		

5. <u>Life Insurance</u>		
<i>Type of Insurance, Policy No. and Issuing Company?</i>	<i>Approximate Value:</i>	<i>Named Beneficiary</i>
If your spouse elects under their statutory entitlement for an equal division of property, will any of the above named beneficiaries change?		

6. <u>Corporate Interests</u>	
Do you have an interest in a private corporation (which company, how much do you own, and the value of those shares)?	Are you a party to a shareholder agreement or a Buy/Sell Agreement (which company and what are the terms?)

Do you own a small business or a sole proprietorship (Name, type and value)?	Any other corporate ownership interests (joint venture, etc.)?
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7. Banking Information

<i>Name of Bank and Location of Branch</i>	<i>Approximate Amount</i>	<i>Type of Account</i>	<i>Joint Account?</i>
Any Safety Deposit boxes?			
Any other bank accounts or depository's?			
Any account held outside Ontario?			

8. Debts Owed BY YOU Including Promissory Notes

<i>Name of Creditor</i>	<i>Amount Owing</i>	<i>Maturity</i>	<i>Other Terms (ie. life insured)</i>

9. <u>Debts Owed TO YOU Including Promissory Notes</u>			
<i>Name of Debtor</i>	<i>Amount Owing</i>	<i>Maturity</i>	<i>Other Terms</i>
Are any shares in the Will to be reduced by a debt owing?		Are any of these debts to be forgiven?	

10. <u>Other Assets</u>	
Are you presently receiving benefits from an estate or trust? If yes, please provide details:	Do you have a power of appointment? If yes, please provide details:
Do you own any property in Florida?	Do you own any digital assets, such as domain names?
Please list any other assets not detailed above:	

Section Three – Instructions for Will

1. <u>Executor for Estate</u>			
	Full Legal Name	Relationship	Age
Initial Executor:			
Alternate Executor (who will be called upon if the initial executor predeceases, is unable to act, or if the initial executor is a spouse who make a statutory election):			
Special Executor (who will only deal with a certain asset, such as foreign owned property, business assets, etc):			

2. <u>Guardian for Children</u>			
	Full Legal Name	Relationship	Age
Primary Guardian:			
Alternate Guardian (who will be called upon if the initial guardian predeceases, or is unable to act)			

3. <u>Disposition of Personal Effects</u>	
If spouse survives, are all personal items to go to your spouse?	If no, who should personal items go to?
If spouse predeceases, are all personal items to go to your children, equally?	If no, who should personal items go to?
If you wish to make a specific gift of any clothing, jewellery, personal effects, household goods, furniture, automobiles etc., please list the specific item, the beneficiary it is to go to, and their relationship to you:	

4. Cash Legacies

If you wish to make a specific gift of a certain amount of cash, please list the specific amount, the beneficiary it is to go to, and their relationship to you:

If you wish to make a charitable bequest, please list the amount, the full legal or registered name of the charity, and the charity's address:

5. Residue

If your spouse survives, is everything to go to your spouse (outright, or in trust)?

If no, please list what percentage of the estate you would like to leave to your spouse:

If your spouse predeceases you, is everything to go your children (equally or inequally)?

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

Are there any other beneficiaries you would leave part of your estate to, including your spouse and children (please list the percentage they are to receive and their relationship to you)?

In the event that one of the above named beneficiaries predeceases, is their share to go to their children, or be divided among the survivors?

In the event that your spouse and children predecease you or die in a common accident, who is to receive your estate (please list beneficiaries, the percentage of share, and their relationship to you)?

6. <u>Other Instructions</u>	
Would you like to include funeral instructions in your Will?	Would you like to include a pet ownership clause in your will?
Do you wish to limit or increase the compensation your Executor is entitled to for the administration of your estate?	Do you wish to change the named beneficiary for any of your RRSP, Pension Plans or Life Insurance Policies?

Section Four – Instructions for Powers of Attorney

1. <u>Power of Attorney for Personal Care</u>			
	Full Legal Name	Relationship	Age
Initial Attorney:			
Alternate Attorney (who will be called upon if the initial executor predeceases, is unable to act, or if the initial executor is a spouse who make a statutory election):			
Are there any treatments or medications you wish to never receive?	Are there any specific instructions with respect to your medical care you would like to be included (DNR, taking all possible measures to preserve and prolong life, etc)?		
Consider section 47(1) of the <i>Substitute Decisions Act</i>			
Do you have the ability to understand whether the proposed attorney has a genuine concern for your welfare?	Do you appreciate that you may need the proposed attorney to make decisions for you?		

2. <u>Power of Attorney for Property</u>			
	Full Legal Name	Relationship	Age
Initial Attorney:			
Alternate Attorney (who will be called upon if the initial executor predeceases, is unable to act, or if the initial executor is a spouse who make a statutory election):			
Are there any conditions or restrictions you wish to impose on the attorney?		Do you wish to delay when the power of attorney comes into effect?	
Consider section 8 of the <i>Substitute Decisions Act</i>			
Do you know what kind of property you currently own and its approximate value?		Are you aware of your obligations to your dependants?	
Do you appreciate the possibility that the attorney could misuse the authority given to them?		Do you understand what the attorney must account for in their dealings with your property?	
Do you understand that, if capable, you may revoke the Power of Attorney?		Do you appreciate that unless the attorney manages the property prudently, the properties' value may decline?	
Do you understand that your attorney will be able to do, on your behalf, anything in respect of property that you could do if capable, except make a will, subject to the conditions and restrictions set out in the Power of Attorney?			