# Personal Will and Estate Planning Workbook

Date: \_\_\_\_\_



This workbook will assist you in getting started on your plan by ascertaining your assets and liabilities and listing your beneficiaries. It also provides you with an opportunity to record critical information such as key contacts and the location of important documents.

## **Personal Information**

YOUR INFORMATION	
Full name	
Home address	
	Home phone
Business phone	Cell phone
Email	Date/place of birth
Citizenship	Marital status
YOUR SPOUSE'S INFORMATION	
Full name	
Home address	
	Home phone
Business phone	Cell phone
Email	Date/place of birth
Citizenship	Marital status
CHILDREN	
<u>Full name</u>	<u>Date of Birth</u>
1	
2	
3	
4	

# **Personal Advisors**

LAWYER	
Name	
Firm	
Address	
Email	Phone
ACCOUNTANT	
Name	
Firm	
Address	
Email	Phone
WEALTH ADVISOR	
Name	
Branch	
Address	
Email	Phone
OTHER ADVISORS (INVESTMENT AND INSURANCE)	
Name	
Branch	
Address	
Email	Phone
Name	
Branch	
Address	
Fmail	Phone

# **Asset information**

#### **BANK ACCOUNTS**

Name and address of institution, account number	Self	Spouse	Joint
1			
2			
3			
4			
Total	\$	\$	\$
NON-REGISTERED INVESTMENTS			
Name and address of institution, account number	Self	Spouse	Joint
1			
2			
3			
4			
5			
6			
Total	\$	\$	\$

#### RRSPs/RRIFs/TFSAs

Type of plan, name and address of institution, account number, beneficiary designation	Self	Spouse
1		
	_	
2	_	
	_	
3	_	
	_	
4		<u> </u>
	_	
5	_	
	_	
Total	\$	\$
PENSION PLANS/ANNUITIES		
Name and address of institution, plan number	Self	Spouse
1	_	_
	_	
2	_	_
	_	
3		
	_	
Total	\$	\$
REGISTERED EDUCATION SAVINGS PLAN		
	<i>a</i> . \	
Type of plan, name and address of institution, name of subscriber(s) and beneficiary	y(ies)	
1		
2		
3		
4		

#### **REAL ESTATE**

Principal residence, vacation property, investment property, etc.  1.	Self	Spouse	Joint
	_ 		
3			
Total	\$ 	\$	\$
PERSONAL PROPERTY			
Cars, boats, jewelry, art etc.	Self	Spouse	Joint
1	_		
2			
3			
4			
5			
6 Total	\$	\$	\$
BUSINESS INTERESTS			
Name of company, address	Type of ownership	Interest held	Value
1			
2	_		
3			
Total	_ \$	%	\$

#### INDIVIDUAL LIFE INSURANCE

Name and address of institution, policy number, beneficiary designation  1	Self	Spouse	Insurance amount
2			
Гotal	\$	\$	\$
GROUP LIFE INSURANCE			
Name and address of institution, policy number, beneficiary designation  1		Spouse	Insurance amount
2			
Total	\$	\$	\$
Liability infor	mation		
LIABILITIES			
Mortgages, bank loans, lines of credit, credit cards, other debts, etc.  1	Self 	Spouse	Joint 
2			
3			
4			
5			

### Important personal documents and information

# WILLS Date of Will \_\_\_\_\_ Lawyer's/Notary's name \_\_\_\_\_ Lawyer's phone \_\_\_\_\_ Email \_\_\_\_\_ Executor's name \_\_\_\_\_ Where documents are held \_\_\_\_\_\_ Executor's phone \_\_\_\_\_ Email \_\_\_\_\_ POWERS OF ATTORNEY/PROTECTIVE MANDATE/REPRESENTATION AGREEMENTS Attorney/Mandatary for property \_\_\_\_\_ Contact info Attorney/Mandatary/Representative for Personal Care\_\_\_\_\_ Contact info\_\_\_\_\_ Where documents held \_\_\_\_\_ **GUARDIANS/TUTORS OF MINOR CHILDREN** Name, relationship, contact info **BENEFICIARIES** Name, relationship, contact info Self Spouse

#### **CHARITIES YOU WISH TO BENEFIT**

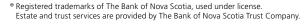
Name, contact info Self	Spouse
1	
2	
3	
4	
FUNERAL PRE-PLANNING	
Self	Spouse
Name of funeral home	
Cemetary name	
Plot location	
Other (e.g. religious contact)	
SAFE DEPOSIT BOX	
Self	Spouse
Location	
Box number	
Key location	
OTHER INSTRUCTIONS	

Your estate planning advisor may request additional personal information including: your residence at time of marriage; whether you have a marriage contract; whether you have been divorced, and if so, whether you have a separation agreement; and/or whether you hold a joint citizenship. Québec residents may also be asked whether they are civilly united and whether you have renounced to the application of the rules of family patrimony. Residents of British Columbia may be asked whether they have stored any genetic material, and, if yes, where.

# **My Family Tree**



You may find it useful to sketch your family structure and relationships on this page.



This document is intended to provide general information related to estate planning and administration and does not constitute legal, accounting, tax or other advice. You should not act upon the information contained in this document without seeking the advice of your own professional advisors.

