

Your Assets:

1. Real Estate: (home, cottage, farm)

Address:	Estimated value:	Amount of mortgage:	In whose name is it registered?
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2. Bank Accounts:

Bank:	Approximate balance:	In whose names?
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3. Pensions, RRSPs, RRIFs:

Company:	Amount:	Beneficiary:
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4. Life Insurance:

Company:	Amount:	Beneficiary:
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5. Stocks and Bonds:

Company:	Approximate value:	Registered in whose name?
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6. Other Assets: ex. Electronic Assets

Description:	Registered in whose name?
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7. Do you hold any assets jointly with anyone other than your spouse? Yes No

If Yes, who is to inherit these on your death?

Your Executor: (The person who will carry out the terms of your will and administer your estate)

1. Primary Executor (who will act if able)

Do you wish to name your spouse? Yes No

Name of Primary Executor if not your spouse:

Address:

2. Alternate Executor (who will act if Primary Executor is unable to act)

Name:

Address:

Relationship to you:

Note: most persons name their spouse as their primary executor if he or she is able, and a relative or adult child or friend as alternate executor.

Special Burial Instructions, (if any)

Note: Burial Instructions are a request only. Your executor is not bound to carry them out. You should advise your executor of any burial instructions while you are alive.

Special Bequests:

(Specific items or sums of money to be given to a specific person, charity or church)

Item:	Beneficiary:	Relationship:	Address:
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Will these be given if:

You only die:

Both spouses are dead:

Your Beneficiaries:

To whom do you wish to leave your estate:

(a) Your spouse if alive? Yes No

(b) Your children on the death of both spouses? Yes No

- will children share equally?
- at what age should children receive their shares?
- if any child dies before you, who should receive his or her share?

(c) Other (describe)

Guardian(s) of Children:

If both spouses are dead, who do you wish to raise your under age children? \

Name(s)	Address:	Relationship to you:	Compensation?
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Powers of Attorney

Power of Attorney for Property

Power of Attorney for Personal Care

Principal Attorney(s):

Principal Attorney(s):

Jointly / Severally

Jointly / Severally

Alternates:

Alternates:

Jointly / Severally

Jointly / Severally

Compensation Yes No

Conditions or Restrictions Yes No

Gifts and Loans Yes No

Living Will? Yes No

Matrimonial Home Yes No

Organ Donation Yes No