



# Will Planning Checklist & Information Guide



# Will Planning Guide

Before meeting with your lawyer or notary to create your Will,  
we suggest you use this Will Planning Guide.

The information in this guide will assist your discussion with your lawyer/notary.

*Please note that this document is for discussion purposes only, and does not constitute or replace a Will.*

## I. GENERAL INFORMATION ABOUT YOU



Surname: \_\_\_\_\_ Given Name: \_\_\_\_\_

Any other names used: \_\_\_\_\_

Address:  
\_\_\_\_\_

Are you planning on moving in the foreseeable future?  Yes  No

Do you live part of the year outside of Canada?  Yes  No

Home Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Citizenship: \_\_\_\_\_

Marital Status:  Single (never married)  Married  Common-law  
 Widowed  Divorced  Separated

## II. GENERAL INFORMATION ABOUT YOUR SPOUSE/PARTNER

Spouse's Name: \_\_\_\_\_

Spouse's Address (if different from above): \_\_\_\_\_

Spouse's Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_

Spouse's Date of Birth: \_\_\_\_\_ Spouse's Citizenship: \_\_\_\_\_

Date and place of marriage, if any: \_\_\_\_\_

Was there a marriage contract or prenuptial agreement?\*  Yes  No

*\*Often marriage and domestic contracts require that the parties place or maintain funeral plans and policies.*

*In order to avoid any legal dispute after your death, please make sure you have worked with an insurance advisor to fulfill those obligations, and provide a copy of any agreement(s) and policy(ies) to your lawyer/notary for review. Your insurance advisor and your lawyer/notary need to work together to create your complete estate plan.*

## III. ABOUT YOUR CHILDREN/DEPENDANTS



Full Name: \_\_\_\_\_

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

City & Province: \_\_\_\_\_

City & Province: \_\_\_\_\_

Relationship to you: \_\_\_\_\_

Relationship to you: \_\_\_\_\_

Age: \_\_\_\_\_ Marital Status: \_\_\_\_\_

Age: \_\_\_\_\_ Marital Status: \_\_\_\_\_

Full Name: \_\_\_\_\_

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

City & Province: \_\_\_\_\_

City & Province: \_\_\_\_\_

Relationship to you: \_\_\_\_\_

Relationship to you: \_\_\_\_\_

Age: \_\_\_\_\_ Marital Status: \_\_\_\_\_

Age: \_\_\_\_\_ Marital Status: \_\_\_\_\_

## IV. WILLS & RECORDS



Do you have a Will?     Yes     No

If yes, when was this Will signed? \_\_\_\_\_

Where is this Will located? \_\_\_\_\_

For ease of retrieval, document the location of other important papers such as financial records and insurance policies:

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

## V. PROFESSIONAL ADVISORS



Keep a list of the names and contact information of your professional advisors, such as:

Physician: \_\_\_\_\_

\_\_\_\_\_

Lawyer: \_\_\_\_\_

\_\_\_\_\_

Accountant: \_\_\_\_\_

\_\_\_\_\_

Stock Broker: \_\_\_\_\_

\_\_\_\_\_

Insurance Advisor: \_\_\_\_\_

\_\_\_\_\_

Purple Shield Representative: \_\_\_\_\_

\_\_\_\_\_

Preferred Funeral Home: \_\_\_\_\_

\_\_\_\_\_

Personal Financial Advisor: \_\_\_\_\_

\_\_\_\_\_

Other: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# DECISIONS TO MAKE

This section of our Will Guide will help you think about some of the decisions that need to be made when creating your Will. Write down any notes and questions in advance, in order to bring them to the attention of your lawyer/notary at your first meeting.

## VI. EXECUTOR(S)

- Will your spouse be an executor?
- Who are your proposed executor(s) if not your spouse? Do you plan to appoint a co-executor with your spouse?
- If there are three or more executors, do you want a “majority decision” binding?

## VII. PROPOSED GUARDIAN FOR CHILDREN

- What is your first choice for guardian(s)?
- What is your backup choice for guardian(s)?

## VIII. ORGAN DONATIONS & DISPOSAL OF REMAINS

- Think about your wishes regarding organ donations, burial versus cremation, disposal of remains (cemetery plot, etc.) and any specific type of funeral memorial or service you desire. Take time to write down any decisions to help guide your loved ones. Your **Canada Purple Shield®** representative will walk you through these steps, and ensure that the funeral home of your choice also has this information for their records.

## IX. DIVISION OF ESTATE AMONG YOUR FAMILY OR OTHER BENEFICIARIES

### A. How do you want to divide your estate?

Please consider the following possibilities should you die:

- Only your spouse survives you
- Only your child(ren) survive you
- No immediate family survives you

## B. How would you dispose of the following?

Personal Effects – Possibilities could include:

- All to one person
- All divided equally
- Executor/liquidator's sole discretion
- As children agree
- Memorandum of wishes, legally binding
- Memorandum of wishes persuasive but non-binding
- Other (be specific)

Your Real Estate (residential or recreational) – Possibilities to consider:

- Gift
- Leave in trust
- Sell
- Other

## C. Would you want...?

- A legacy (e.g. cash, gifts) paid to individuals or charities?
- A special trust (e.g. educational fund for the grandchildren) set up?

## D. How will the remaining property be distributed?

If your spouse survives you:

- Will it be passed on as an outright gift (no strings attached)?
- Will it be held in trust? Possible trust terms to think about:
  - Length of trust (e.g. for life)
  - Amount of income from trust assets to be used
  - Whether the capital of trust assets can be used for your spouse

If the surviving spouse dies, or if there is no spouse:

- Will all go to children or other beneficiaries?
- If children or beneficiaries are under 18 years, then think about how capital should be distributed: different ages and in different percentages or amounts.
- If a child or beneficiary dies before receiving all capital, then does the remaining capital go to their children or to surviving siblings or other beneficiaries?

## E. Family Disaster

If you have no spouse or children, or if they all die before you or with you, please consider whom you wish to become the beneficiaries of your estate (individuals and/or charities).

# X. POWER OF ATTORNEY OF YOUR PERSONAL CARE (I.E. LIVING WILL)



A Power of Attorney for your personal care grants an individual the power to make personal care decisions (medical, living arrangements, etc.) if you are incapacitated and unable to make these decisions for yourself. Please consider how you would like issues of your personal care decided.

If you have already granted Power of Attorney for your personal care, please provide a copy of this document to your lawyer or notary.

If not, please consider the following:

Would you prefer to grant Power of Attorney for your personal care to:

- Your spouse?
- Someone else?
- Someone else and your spouse as co-attorneys?

Who could be a back-up person with this responsibility?

Jot down any discussion notes on the above matters here: \_\_\_\_\_

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---



# FINANCIAL INFORMATION

## XI. INFORMATION ABOUT YOUR ASSETS



### A. Your Real Estate

#### Primary Residence:

Address of primary residence: \_\_\_\_\_

Type of ownership:       Alone                                       Joint tenants with survivorship  
     Tenants in common                       Partnership  
     Through corporation                       Other: \_\_\_\_\_

Approximate current value of property: \_\_\_\_\_

Mortgage(s) with: \_\_\_\_\_                      Approximate balance owed: \_\_\_\_\_

Is this mortgage life-insured?     Yes     No

#### Your recreational, rental or secondary property:

Address of primary residence: \_\_\_\_\_

Type of ownership:       Alone                                       Joint tenants with survivorship  
     Tenants in common                       Partnership  
     Through corporation                       Other: \_\_\_\_\_

Approximate current value of property: \_\_\_\_\_

Mortgage(s) with: \_\_\_\_\_                      Approximate balance owed: \_\_\_\_\_

Is this mortgage life-insured?     Yes     No

### B. Your Bank Accounts

	Name of Bank	Location	Amount	Ownership (sole or joint)
1				
2				
3				
4				

**C. Your Personal & Household Items Including Vehicles**

List any items of personal property that you wish to discuss: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**D. Your Funeral Plan**

Do you have a plan through Canada Purple Shield®?  Yes  No

If no, please call 1.877.234.8008 or visit [www.atlanticpurpleshield.com](http://www.atlanticpurpleshield.com) for more information about planning your final wishes.

If yes: Your Canada Purple Shield® Representative:

\_\_\_\_\_

Policy death benefits:

\$ \_\_\_\_\_

Beneficiary(ies): \_\_\_\_\_

Funeral Home of Choice: \_\_\_\_\_

**E. Other Insurance**

Do you own a life insurance policy?

On your life:  Yes  No

On spouse's life:  Yes  No

On child's life:  Yes  No

Insurance Company: \_\_\_\_\_

Policy death benefits: \$ \_\_\_\_\_

Beneficiary(ies): \_\_\_\_\_

Do you have group coverage?  Yes  No

If yes, is your coverage through:  an association  your employer  your spouse's employer

other: \_\_\_\_\_  does not apply

Insurance Company: \_\_\_\_\_

Policy death benefits: \$ \_\_\_\_\_

Beneficiary(ies): \_\_\_\_\_

When does coverage expire? \_\_\_\_\_

## XII. CHECKLIST FOR EXECUTORS



The following is not a complete list of the duties and responsibilities of an executor, but it does provide a good overview of the principle tasks:

- Make all funeral arrangements
- Identify all savings and Chequing accounts of the deceased. Notify all financial institutions about the death and obtain up-to-date information about the balances on deposit.
- Locate all insurance policies and obtain information about the amount payable on each. Notify the insurer of the death.
- Access and list the contents of the deceased's safety deposit box.
- Review the deceased's personal papers to determine all assets and liabilities (debts).
- Prepare a detailed statement of assets and liabilities.
- Arrange for storage and insurance of any assets that require it.
- Notify the beneficiaries of the death, if necessary, and advise them of their entitlement under the Will.
- Redirect mail and cancel any subscriptions or charge accounts. Return or destroy credit and charge cards.
- Obtain all unpaid wages and other benefits from former employer.
- Apply to the court for Letters of Probate.
- Advertise for creditors, if necessary.
- File income tax returns for year of death and any outstanding from former years.
- Apply for Canada Pension Plan benefits, if any. (If the deceased ever worked outside Canada, foreign social security benefits may also be payable.)
- Apply for any amounts payable to the estate under insurance policies.
- Pay funeral expenses, income taxes payable and all debts of the deceased.
- Pay money bequests and distribute specific gifts of property according to the instructions in the Will (be sure to obtain receipts and to retain sufficient cash to carry out the final steps.)
- File the estate's income tax return and pay any tax owing (i.e., if the estate earned any income following the death of the deceased).
- Pay legal fees and any outstanding fees related to administering the estate, including compensation for personal representative(s).
- Determine residuary beneficiary preferences for 'specie' or cash distributions and arrange sale or transfers of the estate assets to the rightful beneficiaries.
- Prepare and distribute a final report to the beneficiaries.

## Disclaimer

**Note:** The author, the publisher, and the vendor of these forms make no representations or warranties regarding the outcome or the use to which these forms are put, and are not assuming any liability for any claims, losses, or damages arising out of the use of these forms. The user of this information should not rely on the author or publisher of these forms for any professional advice.

**Wills:** Please be aware that there are statutory and common law rules that govern the making and validity of wills, some of which may be unique to the province in which you reside. These may include laws that require certain people to be included among your beneficiaries. Accordingly, and due to the uniqueness of individual circumstances, it is advisable to seek professional advice.

You should always obtain a lawyer's advice:

- If you have a large or complex estate.
- If you are separated or contemplating divorce.
- If you are older and potentially subject to undue influence from possible beneficiaries.
- If you are contemplating marriage.

