

Name:

Address:

Valid ID:

Please furnish the following information*:

- 1) Name, address, telephone number, email id of the executor/alternate executors:

- 2) Details of Beneficiaries/Dependents, including disabled children;

- 3) Beneficiaries named in RRSPs, life insurance policies and pension plans;

- 4) In case of failure of gifts, is there any person/charity to whom the gifts should go:

- 5) Please provide a full and accurate inventory of your assets/property, together with any information or documentation that may have a bearing on your authority or ability to dispose of any of the property.
Real Property:

Bank accounts, Locker:

Investments stock options/RRSP, TFSA:

RESP:

Insurance policies:

Pension Plan:

Any other assets:

- 6) Details of the existence of a prior will;
- 7) Status of present/ past marital relationships, other children or stepchildren, or whether a spouse is a married spouse or common law spouse;
- 8) Any children or beneficiary is under the age of majority and needs legal guardian other than executors:
- 9) Any other information relevant to the drafting of the will:

*please write in a separate sheet if the space here is not enough.