

Will Preparation Worksheet

1. Proper spelling of your name in full according to your Birth Certificate

2. Full address

3. Occupation

4. Marital status

5. Date of birth according to your Birth Certificate

6. Proper spelling of name in full of spouse according to Birth Certificate

7. Full names and dates of birth of children according to their Birth Certificate. Also address of children if different from yours. (Use attached sheet if necessary)

8. Full names, addresses and dates of birth of other beneficiaries and relationship to you, if any.

WORK SHEET - NOT TO BE SIGNED - NOT TO BE USED AS A WILL

9. Full names and addresses of guardians and alternate guardians if preferred.
(Cannot be minors)

10. Full name and address of proposed executor(s) (Cannot be Guardians) (Executors can be individuals or Trust Companies)

11. Full name and address of proposed alternate executor(s) (Cannot be Guardians)
(Executors can be individuals or Trust Companies)

12. List names of beneficiaries and percentage of share of estate to each beneficiary and reason for bequest if possible. Can be specific bequest of personal property (i.e. cash) or division of real property.

Specific devise or bequest:

<u>Beneficiary</u>	<u>Reason for bequest</u>	<u>Or Percentage or Share</u>
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13. List specific items such as heirlooms for each beneficiary for a Memorandum to be attached to your Will if you would like a Memorandum to specifically specify certain items to certain beneficiaries.

<u>Name of Beneficiary</u>	<u>Item</u>
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14. COMMON DISASTER: In the event of a common disaster - no survivors (spouses), indicate in what shares the children are to get the estate at what ages. (Most common is 1/3 share at ages 21, 25 and 30)

<u>Name of Child</u>	<u>Share</u>	<u>Age</u>
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15. COMMON DISASTER: In the event of no surviving spouse, children or grandchildren, specify to whom and in what percentage do you wish you and your spouse's estate to devolve where wills are reciprocal. Keep in mind charities, relatives and friends.

<u>Name</u>	<u>Reasons for Bequest</u>	<u>Percentage of share</u>
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16. ASSETS: List all assets, both real and personal (personal includes insurance, equipment, bank accounts, bonds, stocks, investments, household property and other items of value not real property. Real property includes land buildings and fixtures) Set out fair market value where no value stated.

<u>Asset</u>	<u>Fair Market Value</u>
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17. LIABILITIES: Please list all liabilities and whether Life Insured or Disability insured or not.

Liability

Life Insurance or Disability Insurance

18. What is your net worth (i.e. total assets less non life insured liabilities)

TOTAL ASSETS - NON LIFE INSURED LIABILITIES = NET WORTH

AMOUNT:

Notice To Readers

This pamphlet consists of materials that have been assembled, some of which are aged, and some of which are applicable to other provinces of Canada. It is provided for informational and educational purposes only. It contains general information about one area of the law, wills, it does not contain a complete statement of the law in this area. If you have a legal problem, you need legal advice that this pamphlet cannot provide. To get legal advice contact a lawyer as changes in the law occur on a daily basis. The information in this pamphlet is already out of date.