

**WILL INSTRUCTIONS  
PERSONAL DATA SHEET**

File No.: \_\_\_\_\_

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

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

**Part I. FAMILY INFORMATION**

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

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

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Telephone No.:

Home: \_\_\_\_\_

Business: \_\_\_\_\_

Fax: \_\_\_\_\_

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

Annual Income: \$ \_\_\_\_\_

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

Residence for Income Tax Purposes: \_\_\_\_\_

**Spouse**

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

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

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Telephone No.:

Home: \_\_\_\_\_

Business: \_\_\_\_\_

Fax: \_\_\_\_\_

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

Annual Income: \$ \_\_\_\_\_

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

Residence for Income Tax Purposes: \_\_\_\_\_

**Children**

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

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

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

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

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

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

Others to be Named as Beneficiaries, if any:

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

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

Relationship: \_\_\_\_\_

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

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

Relationship: \_\_\_\_\_

**Part II. GENERAL**

Do you have a will? \_\_\_\_\_

Does your spouse have a will? \_\_\_\_\_

Are you presently receiving benefits from an estate or trust? \_\_\_\_\_

Is so, please give particulars.

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

Have you set up a trust to benefit another person? \_\_\_\_\_

Is so, please give particulars.

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

Do you and your spouse have a marriage contract? \_\_\_\_\_

If so, please give particulars.

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

Are you an executor or trustee of any estate? \_\_\_\_\_

Do you have your own accountant, financial planner and life insurance agent?

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

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

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

Do you own or have an interest in a business? \_\_\_\_\_

(i.e., sole proprietorship, partnership, limited company)

Provide copies of business agreements. Please provide details on back of this sheet.

Have you been married more than once? \_\_\_\_\_

If yes, please provide copies of your Judgment for Divorce, Separation Agreement, etc.

Do you have any children from a previous relationship? \_\_\_\_\_

**Part III. ASSETS**

Record your assets and those of your spouse, and record the date, cost on acquisition and current value.

1. **Automobiles and Boats**

(a) Particulars: _____	(b) Particulars: _____
Value: \$ _____	Value: \$ _____
In Whose Name: _____	In Whose Name: _____

2. Approximate value of household goods and contents: \$ \_\_\_\_\_

3. **Real Estate**

(a) Location: _____	(b) Location: _____
_____	_____
_____	_____
Value: \$ _____	Value: \$ _____
Original Cost: \$ _____	Original Cost: \$ _____
In Whose Name: _____	In Whose Name: _____

4. **Bank Accounts**

(a) Name of Bank: _____	(b) Name of Bank: _____
Address: _____	Address: _____
_____	_____
_____	_____
Account No.: _____	Account No.: _____
In Whose Name: _____	In Whose Name: _____
Average Balance: \$ _____	Average Balance: \$ _____

5. **Safety Deposit Boxes**

(a) Location: _____	(b) Location: _____
Box No.: _____	Box No.: _____

6. **Life Insurance**

(a)	Name of Company: _____	(b)	Name of Company: _____
	_____		_____
	Policy No.: _____		Policy No.: _____
	Type of Plan: _____		Type of Plan: _____
	Beneficiary: _____		Beneficiary: _____
	Value of Benefit: \$ _____		Value of Benefit: \$ _____
	Owned By: _____		Owned By: _____

7. **RRSPs, Pension, Annuities**

(a)	Name: _____	(b)	Name: _____
	Contract No.: _____		Contract No.: _____
	Beneficiary: _____		Beneficiary: _____
	Anticipated Value: \$ _____		Anticipated Value: \$ _____

8. **Investments**

Stocks and/or bonds and their original costs and estimated market values.

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9. **Property Outside of Canada**

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10. **Other Assets**

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**Part IV. LIABILITIES**

1. **Mortgages Payable by You**

(a)	Amount Owning: \$ _____	(a)	Amount Owning: \$ _____
	Name of Mortgagee: _____		Name of Mortgagee: _____
	_____		_____

2. **Other Debts**

(a)	Amount Owning: \$ _____	(a)	Amount Owning: \$ _____
	Name of Creditor: _____		Name of Creditor: _____
	_____		_____

**Part V. SUMMARY**

Total Value of Assets: \$ \_\_\_\_\_  
Less: Total Value of Liabilities: \$ \_\_\_\_\_  
Net Value of Your Estate: \$ \_\_\_\_\_

**Part VI. WILL INSTRUCTIONS**

1. Do you want a spousal will? \_\_\_\_\_  
(i.e. Do you want everything to go to your spouse if he/she survives you?)
  
2. If spouse predeceases, who are alternative executors?
  - (i) \_\_\_\_\_
  - (ii) \_\_\_\_\_
  - (iii) \_\_\_\_\_
  
3. Disposition of household goods, personal effects, jewellery, automobiles, etc.:  
\_\_\_\_\_
  
4. Disposition of residence and/or cottage: \_\_\_\_\_
  
5. Cash legacies: \_\_\_\_\_
  
6. Disposition of RRSPs, Annuities, Pensions: \_\_\_\_\_
  
7. Residue
  - (i) in trust for children: \_\_\_\_\_
  - (ii) how old do you want children to be before vesting? \_\_\_\_\_
  - (iii) one trust or a number of trusts as you have children? \_\_\_\_\_
  - (iv) what happens if there are no children? \_\_\_\_\_
  - (v) what happens if there are no grandchildren? \_\_\_\_\_
  
8. Are executors to have broad powers for retention, sale, investing of assets, including mutual funds and common trust funds, and if a trust company, investment in own securities, etc.? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. Special clauses to be included:

(a) Appointment of guardians and custodians for children:

Name(s): \_\_\_\_\_

Address(es): \_\_\_\_\_

Fee Agreement: \_\_\_\_\_

Exclude illegitimate children: \_\_\_\_\_

Family law clauses: \_\_\_\_\_

(i.e. spouse of beneficiaries not to have claim)

10. Funeral and other special instructions: \_\_\_\_\_

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

11. Any other special instructions: \_\_\_\_\_

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

**Part VII. POWERS OF ATTORNEY**

1. Do you wish to have Powers of Attorney prepared? \_\_\_\_\_

(a) a Continuing Power of Attorney for Property? \_\_\_\_\_

Who do you want to be your Attorney? (Same as executors in wills - Yes/No)

\_\_\_\_\_

(b) a Power of Attorney for Personal Care? \_\_\_\_\_

Who do you want to be your Attorney? (Same as executors in wills - Yes/No)

\_\_\_\_\_

Do you want to incorporate a living will? (Yes/No) \_\_\_\_\_

2. Any other special instructions?

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