



Instructions for wills

1. Date:
2. Name of client: age:
3. Address:
4. Telephone No: (Cell) (Work)
5. Marital Status:
6. Occupation:
7. Children: Name date of birth residence occupation

8. Executors with their address:
 - 1.
 - 2.
 - 3.

9. Power of Attorney with their address:
 - 1.
 - 2.

10. Guardianship for child:

11. **Property details:**
house: address, personal property: automobile, jewelry, boat, snowmobile, etc.,

Bank accounts:
Security deposit box: [] yes [] no where:

Other: RRSP, bonds, pension, shares, debts

12. **Specific bequest:** This means if you are giving something special to someone or maybe a certain amount of money to someone.

13. **Residue:** This is after everything is given away, what is left (to who)

14. **Distribution if spouse dies:** This is if you left everything to spouse where would it go if he died.

15. **Distribute equally:** do you want to give the estate equally divided say for instant between children 1, 2 and 3? If you leave it to your kids, if that kid 1 passes on, does it go to the kid 1's children or does his share goes to kids 2 and 3.

exception for handicap child:

- if child dies before 19 years of age:
- his heirs yes no
- divided between living brothers and sisters: yes no

16. Distribution unequal and why:

17. **Special request:** senior home, power of guardianship, executors or/and power of Attorney this would be if you wanted your kids to have a guardian, want your parents to go to a specific senior home because they were in your care, want to get away your power of attorney if you were appointed for someone (example if you were power of attorney for your dad)

18. Distribution if parents and children die together: **(that is if everyone died together)**

19. Amount allotted to:

- executors: % \$ your executor normally get 3%-5%
- guardian:
- trustee: 10% interest each year or % of amount paid each year or other
- power of attorney \$ each year installments

20. Power:

- executors absolute restricted **when you appoint an executor you can restrict them to a specific thing. This would be in cases where you would own a business and you would not want the executor to deal with this.**
- trustee absolute restricted

21. Special instruction:

- organ donation yes no

22. Funeral arrangements:

- Cremated [] yes [] no
- buried [] yes [] no
- Which Funeral service?

23. Where will the client keep original will:

24. Supplementary notes: