



For Office Use: File # 23 \_\_\_\_\_ 1st / rpt ID ctc'd  
Searches required: LTO / BC Assessment / Corp / PPR  
Location of Will: \_\_\_\_\_

## Client Will Interview Questionnaire

**NOTE:** We ask that all completed Will Questionnaires be returned to us at least 2 business days before your scheduled appointment time with the Notary. All of these questions may not apply in your circumstances. If you have any questions about filling out this form, please do not hesitate to call our office. Alternatively, your questions can be addressed when we meet with you.

### Will Maker's Information

**PLEASE USE FULL LEGAL NAMES**

*\*provide copy of birth certificate, if available\**

Last name: \_\_\_\_\_

**Your** first name: \_\_\_\_\_ Middle name(s): \_\_\_\_\_

Your aliases/nicknames/previous names: \_\_\_\_\_

Your occupation: \_\_\_\_\_

**Spouse** first name: \_\_\_\_\_ Middle name(s): \_\_\_\_\_

Spouse last name (if different): \_\_\_\_\_

Spouse aliases/nicknames/previous names: \_\_\_\_\_

Spouse's occupation: \_\_\_\_\_

**Street Address:** \_\_\_\_\_

City: \_\_\_\_\_

Postal code: \_\_\_\_\_

### Particulars of Birth

Your birth date: \_\_\_\_\_ Birth place: \_\_\_\_\_

Spouse birth date: \_\_\_\_\_ Birth place: \_\_\_\_\_

### Citizenship

Yours:  Canadian  USA  Other: \_\_\_\_\_ CDN resident  Yes

Spouse:  Canadian  USA  Other: \_\_\_\_\_ CDN resident  Yes

### Contact Information

**Your Phone Numbers**

Work: \_\_\_\_\_

Cell: \_\_\_\_\_

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

Your email: \_\_\_\_\_

Spouse email: \_\_\_\_\_

**Spouse Phone Numbers**

Work: \_\_\_\_\_

Cell: \_\_\_\_\_

**Is it okay to send drafts of documents by email?**  NO  YES

## Client Will Interview Questionnaire

### Do you have an existing or previous will?

You?  NO  YES > Date \_\_\_\_\_ *\*please provide a copy\**  
 Spouse?  NO  YES > Date \_\_\_\_\_ *\*please provide a copy\**  
 What is your purpose to make a Will at this time? \_\_\_\_\_  
 Where will you keep your new Will? \_\_\_\_\_

### Do you or your spouse have other responsibilities?

- NO  YES Legal guardian for someone under age of 19 years who is not your child?  
 NO  YES Committee or other legal guardian for disabled or incapacitated adult?  
 NO  YES Currently serving as an Executor?  
 NO  YES Named as Executor?

### Do you have other personal planning documents?

- NO  YES Power of Attorney > if Yes, to whom \_\_\_\_\_ Date \_\_\_\_\_  
 NO  YES Health Agreement > if Yes, to whom \_\_\_\_\_ Date \_\_\_\_\_  
 NO  YES Advance Health Directive > if Yes, to whom \_\_\_\_\_ Date \_\_\_\_\_

## Family Matters & Hierarchy

A significant part of Will & Estate planning is your family. Family structures can change due to death, divorce, re-marriage, new common law, illness, and many other reasons. There is a rise in Will variation claims. So all relevant information will help to plan important Will & document gifting strategies for you. Regardless of whether you are gifting to spouses, children, other family members, or leaving less or disinheriting, it helps the Notary to understand the structure, hierarchy, and dynamics of the family in order to provide relevant advice and document information appropriate to your unique situation.

### What is your current family status?

*Check all that apply or provide further information.*

- Married** / Date of Marriage: \_\_\_\_\_ Place of Marriage: \_\_\_\_\_  
 • Have you signed a Marriage Agreement i.e. Pre-Nuptial?  NO  YES
- Common Law** / Date Common Law status began: \_\_\_\_\_  
 • Have you signed a Relationship Agreement?  NO  YES  
 • Have there been any break ups with a common law spouse?  NO  YES
- Other** >  Engaged  Separated  Divorced  Widowed  Never Married  
 > **If Widowed**, date of death of Spouse: \_\_\_\_\_  
 > **If Divorced**, date divorce took effect: \_\_\_\_\_  
 > **If Separated or Divorced**, is there a Separation Agreement?  NO  YES *\*please provide a copy\**

## Client Will Interview Questionnaire

### Who lives in your home?

- Just Me  Me & My Spouse  Minor Children  Adult Children  Roommate  Other

**Provide any relevant information to your family status that may affect your Will**

*(i.e. previous marriage or relationship):*

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### Are you a blended family?

- NO  YES

### Who is in your family?

*Check all that apply.*

- |   |   |
|---|---|
| <input type="radio"/> Parents for You       | <input type="radio"/> Parents for your Spouse       |
| <input type="radio"/> Siblings for You      | <input type="radio"/> Siblings for your Spouse      |
| <input type="radio"/> Grandparents for You  | <input type="radio"/> Grandparents for your Spouse  |
| <input type="radio"/> Children for You      | <input type="radio"/> Children for your Spouse      |
| <input type="radio"/> Grandchildren for You | <input type="radio"/> Grandchildren for your Spouse |

Have you ever placed a child up for adoption?  NO  YES

### Family with Special Needs Requirements

Do you have concerns about any of the following?

- A child who has special needs? >  A stepchild? >  A child who is not residing with you?  
 An adult child who is not capable of managing his or her own affairs?  
 Are you interested to create a special trust for someone?  
> **If ANY**, are you considering to leave less or more or differently to such child? Other information?

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**TRUSTS:** Notary Publics are restricted in the areas of Estate trusts – please make Notary aware of relevant information prior to the initial Will interview OR at the beginning of the interview.

### Furry or Feathered Family

Do you have any pets?  NO  YES

### Reproductive Technology

Do you have stored reproductive material such as sperm, eggs, embryos?  NO  YES

## Client Will Interview Questionnaire

### Children

Child(ren) includes a child of your marriage, a child born outside of marriage & an adopted child.

	Full Legal Name	DOB	Address	Whose Child?	Any Grandchildren?
1					
2					
3					
4					
5					
6					
7					
8					

NOTES: \_\_\_\_\_  
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### Guardianship of Minors

Does Not Apply  Applies

> **If Guardianship applies**, do you want to default to the surviving Spouse?  NO  YES

**1st / Primary Guardian** Relationship: \_\_\_\_\_

Full legal name: \_\_\_\_\_

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

**2nd / Alternate Guardian** Relationship: \_\_\_\_\_

Full legal name: \_\_\_\_\_

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

## Client Will Interview Questionnaire

### Executor-Trustee

**\*The person who administers your Estate\***

**Executor #1** Is your primary Executor a spouse already identified on page 1?  NO  YES

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

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

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

**Executor #2** Are they Alternate to #1 or Joint with #1 or #2 (circle)

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

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

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

**Executor #3** Are they Alternate to #1 and then #2, or Joint with # 2 (circle)

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

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

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

### Funeral, Services, Burial/Creamation, Organ Wishes

What do you wish be done with your remains?  Cremated  Burial → if spouses, for both?  NO  YES

Do you have pre-arranged funeral plans or special instructions?  NO  YES

> **If YES**, details: \_\_\_\_\_

> **If NO**, do you want to leave it with the Executor to decide?  NO  YES

Are you, or do you wish to be an organ donor?  NO  YES

### Assistance to Executor

Do you wish to nominate your Notary or a Lawyer to assist the Executor in winding up your Estate?

NO  YES > **If YES**, supply the name of your legal professional: \_\_\_\_\_

*Client Will Interview Questionnaire*

*Your Wishes – Who or Where Your Estate Goes to*

**Residue**

*(Generally the bulk of your Estate or what's left after all the expenses, cash gifts are paid.)*

- If spouse is alive at my death, then I want everything to go to my spouse.  NO  YES
- If my spouse predeceases me, then give the residue to my children equally.  NO  YES
- If a child predeceases then to that child's children (your grandchildren).  NO  YES
- If none of above apply then please describe: \_\_\_\_\_

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**Do you want to make cash gifts to people or charities?**

NO  YES  MAYBE

*\*\*you may provide these details on separate piece of paper\*\**

> **If YES, PEOPLE** → full legal name(s) & how much or what percentage:

	Full Legal Name	Address	Amount or %
1			
2			
3			

> **If YES, CHARITIES** → full legal name(s) of charity & how much or what percentage:

	Charity Legal Name	Address	Amount or %
1			
2			
3			

> **Does estate have enough money to satisfy people or charity gifts?**  NO  YES  NOT SURE

## Client Will Interview Questionnaire

### When Beneficiaries are Under 19 Years Old

Our general trust gives your child the interest from their share of the Estate at the age of 19 years old. The capital of the residue is held in trust until either they turn 19 years old or the youngest of a group (or class of beneficiaries) turns 19 years old. For example, if children are 7, 10, and 13 years old when they inherit, they will not receive funds until they are 19, 22, and 25 years of age.

Choose one. If there are minor beneficiaries, then I want them to receive their inheritance:

- YES, when the youngest beneficiary of a group turns 19 years old; or
  - YES, as each beneficiary turns 19 years old.
- NO  YES, I want funds for minor beneficiaries to be used for their well-being, health, and education until they turn 19 years old.

### Do you have special personal items?

I want to give specific personal effects to someone:  NO  YES

- › **If YES**, Do you want this to be as **per memorandum to be left with Executor**,  NO  YES  
 › or identify i.e. jewelry, household goods, furniture, auto, boat, artwork, air miles, etc.

Item (list, describe)	Goes to (name of person)

**\*\*Attach separate list if required\*\***

### Digital Assets

A digital asset is any form of electronic data, along with the right to use that data. Some examples of digital assets would be internet accounts such as Facebook and LinkedIn; email accounts like hotmail.com and yahoo.com; hosted websites and blogs; and online banking and financial accounts; electronic books sold online; Dot Com names you own; are all examples of digital assets. Please list the digital assets you currently hold:

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### What do you estimate your Estate value at?

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### Have you advanced large sums of monies to others?

- NO  YES

Explain: \_\_\_\_\_

## Client Will Interview Questionnaire

### What do you own?

When making a Will it is important that you understand what you own and what you owe. You don't need to look up account numbers but give approximate information. i.e. bank acct TD Bank \$3000-\$5000, joint names.

Assets		Location/Estimate of Value	In Whose Name?
Home	<input type="radio"/> NO <input type="radio"/> YES		Joint tenants? Tenants in common?
Recreational Property	<input type="radio"/> NO <input type="radio"/> YES		
Bank Accounts	<input type="radio"/> NO <input type="radio"/> YES		
Financial Investments i.e. Mutual Funds, GICs, etc.	<input type="radio"/> NO <input type="radio"/> YES		
Automobile, Boats, etc.	<input type="radio"/> NO <input type="radio"/> YES		
Furniture	<input type="radio"/> NO <input type="radio"/> YES		
Collectibles Valued Over \$5000	<input type="radio"/> NO <input type="radio"/> YES		
Air Miles, Aeroplan, Similar Rewards Plan	<input type="radio"/> NO <input type="radio"/> YES		
RRSP/RRIF	<input type="radio"/> NO <input type="radio"/> YES		Who is the beneficiary?
RESP	<input type="radio"/> NO <input type="radio"/> YES		Who is the beneficiary?
TFSA	<input type="radio"/> NO <input type="radio"/> YES		Who is the beneficiary?
Pensions	<input type="radio"/> NO <input type="radio"/> YES		Who is the beneficiary?
Life Insurance	<input type="radio"/> NO <input type="radio"/> YES		Who is the beneficiary?
Business & Corporate Ownership	<input type="radio"/> NO <input type="radio"/> YES	Provide Corporate Name:	
Assets in Other Country/ Province i.e. Land, Time Share	<input type="radio"/> NO <input type="radio"/> YES		
OTHER (Provide Detail)	<input type="radio"/> NO <input type="radio"/> YES		



*Client Will Interview Questionnaire*

**What do you owe?**

Debts		Location/Estimate of How Much Owning
Mortgage on Home/Mortgage Line of Credit	<input type="radio"/> NO <input type="radio"/> YES	
Personal Line of Credit	<input type="radio"/> NO <input type="radio"/> YES	
Credit Card #1 Bank:	<input type="radio"/> NO <input type="radio"/> YES	I/we usually hold a balance <input type="radio"/> or pay off monthly <input type="radio"/>
Credit Card #2 Bank:	<input type="radio"/> NO <input type="radio"/> YES	
Credit Card #3 Bank:	<input type="radio"/> NO <input type="radio"/> YES	
Furniture	<input type="radio"/> NO <input type="radio"/> YES	
Automobile, Boats	<input type="radio"/> NO <input type="radio"/> YES	
Business	<input type="radio"/> NO <input type="radio"/> YES	
Personal Loans	<input type="radio"/> NO <input type="radio"/> YES	
Co-Signed Loans	<input type="radio"/> NO <input type="radio"/> YES	
OTHER (Provide Detail)	<input type="radio"/> NO <input type="radio"/> YES	

**Have you advanced large sums of monies to others?**

NO  YES

Explain: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
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