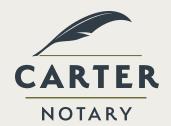


For Office Use:	File # 23	_1st / rpt	ID ctc'd
Searches require	ed: LTO / BC Assessment / Corp / PPR		
Location of Will:			

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.

Wil	l Maker's Information	
	SE USE FULL LEGAL NAMES opy of birth certificate, if available*	
Last name:		
Your first name:	Middle name(s):	
Your aliases/nicknames/previous names:		
Your occupation:		
Spouse first name:		
Spouse last name (if different):		
Spouse aliases/nicknames/previous names		
Spouse's occupation:		
Street Address:		
City:		
Postal code:		
	Dantian lang of Birds	
	Particulars of Birth	
Your birth date:	Birth place:	
Spouse birth date:	Birth place:	
	Citizenship	
Yours: Ocanadian OUSA Oother:		CDN resident OYes
Spouse: OCanadian OUSA Oother:		CDN resident OYes
	Contact Information	
Your Phone Numbers	Spouse Phone Numbers	
Work:		
Cell:		
Home:		
Your email:		
Spouse email:		
Is it okay to send drafts of documents by	email? ONO OYES	



	Do you ł	nave an existing or previous will?	
Spouse? ONO What is your p	O ○ YES ➤ Date urpose to make a Will at th	is time?	
	Do you or yo	ur spouse have other responsibilities?	
ONO YES		ne under age of 19 years who is not your ch guardian for disabled or incapacitated adult ecutor?	
	Do you have	other personal planning documents?	
O NO O YES	Health Agreement		_Date _Date _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? ONO YES				
 Common Law / Date Common Law status began:				
 Other ➤ ○ Engaged ○ Separated ○ Divorced ○ Widowed ○ Never Married ➤ If Widowed, date of death of Spouse:				



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):
Are you a blended family?
○ NO ○ YES
Who is in your family?
Check all that apply. Parents for You Parents for your Spouse Siblings for You Grandparents for your Spouse Children for You Grandchildren for You Grandchildren for your Spouse Grandchildren for You 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?
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? O NO YES
Reproductive Technology
Do you have stored reproductive material such as sperm, eggs, embryos? ONO YES



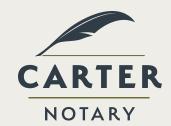
Full legal name: _

Address: _

		Children		
hild(ren) includes a child o	f your marriage,	a child born outside o	f marriage & an adop	ted child.
Full Legal Name	DOB	Address	Whose Child?	Any Grandchildren
1				
2				
3				
4				
5				
6				
7				
8				
		uardianship of Minc		
		oes Not Apply App		
t If Guardianship applies, st / Primary Guardian full legal name:	Relationship:			
Address: 2nd / Alternate Guardian				



Executor-trustee
The person who administers your Estate Executor #1 Is your primary Executor a spouse already identified on page 1? ONO 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? ONO 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:



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:				
	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: 				
≻ If	YES, PEOPLE → full legal name(s) & h			
> If	YES, PEOPLE → full legal name(s) & h Full Legal Name		Amount or %	
> If	-	now much or what percentage:	Amount or %	
	-	now much or what percentage:	Amount or %	
1	-	now much or what percentage:	Amount or %	
1 2 3	Full Legal Name	now much or what percentage:	Amount or %	
1 2 3	Full Legal Name	Address	Amount or %	
1 2 3	Full Legal Name YES, CHARITIES → full legal name(s)	Address of charity & how much or what percentage:		
1 2 3 > If	Full Legal Name YES, CHARITIES → full legal name(s)	Address of charity & how much or what percentage:		
1 2 3 > Iff	Full Legal Name YES, CHARITIES → full legal name(s)	Address of charity & how much or what percentage:		



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:

- O YES, when the youngest beneficiary of a group turns 19 years old; or
- O 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: $ igcirc$ NO $ igcirc$ YE.

- ➤ 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:

What do you estimate your Estate value at?

nave you davanced large sums of monies to others:	
○ NO ○ YES	
Explain:	



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.

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

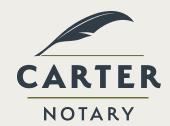


What do you owe?

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

NO YES Explain:

Have you advanced large sums of monies to others?



Other Questions
Do you spend significant time out of the country? ONO YES
If an RRSP or RRIF or any other financial instrument is cashed in as a result of your death, would there be any impact on the gifts or residue of your estate? \bigcirc NO \bigcirc YES \bigcirc NOT SURE
If any assets are cashed in as a result of your death will there be tax implications for your estate? NO YES NOT SURE
Would any of your assets incur capital gains? O NO YES O NOT SURE
Is there a priority to any of your gifts? ONO YES ONOT SURE ODISCUSS WITH NOTARY
Have you done any tax planning with your Accountant or Financial Planner that may impact your Will? NO YES NOT SURE
Are any household contents owned separately by you or others? ONO YES NOT SURE
Anything Else?
mentioned elsewhere? Please feel free to attach further notes or bring them up when we meet.
You may either email this completed form to: notary@carternotary.com or drop off a printed and completed copy at our office located at: 240 - 2950 Douglas Street, Victoria, BC V8T 4N4



Additional Notes or Detail	

Beverly Carter, Notary Public*, Sole Proprietor Victoria Helmink, Notary Public*, Associate *Professional Members of Society of Notaries Public of BC