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WILLS CHECKLIST

Please have prepared answers to the following questions before you see our lawyers:

1. Who will manage your estate as executor or estate trustee? If for any reason that person cannot act, who will be your alternate executor or estate trustee?
2. How do you wish to dispose of your personal belongings? Please provide list.
3. Will you leave any money to any person or organization?
4. Who will inherit the balance of your estate?
5. Who will be alternate beneficiaries if those named fail to survive you?
6. Are any of your beneficiaries mentally or physically disabled?
7. What age should children be entitled to a share of your estate?
8. Who will care for your children if both parents are dead?
9. Do you wish to benefit persons born outside marriage, stepchildren, or foster children?
10. Do you wish to include funeral wishes in your will?
11. Do you wish to donate your organs or your body for science purposes?
12. Are you supporting anyone? If there is a court order, please bring a copy.
13. Are you liable for anyone's debt because you have signed a guarantee?
14. Have you signed a buy-sell agreement or made any other business agreements please bring a copy.
15. If you are married, were any of your assets given to you or inherited by you? If so, did you receive the gift before or after your marriage?
16. Do you have any assets outside Canada?
17. Are any of your executors or beneficiaries outside Canada?
18. Do you have any personal belongings of unusual value?
19. Does anyone owe you money?
20. Do you have any large debts apart from a mortgage?
21. List the names and addresses of all executors or estate trustees and beneficiaries.