

PLANNING YOUR WILL

A worksheet to prepare for meeting with an Abundance Canada gift planning consultant.

FAMILY INFORMATION

Date: _____

#1 Full legal name _____

aka: (née) _____ DOB _____

#2 Full legal name _____

aka: (née) _____ DOB _____

Single Married Widowed Separated Divorced Remarried Common Law

Address _____ Email address _____

Telephone: Res _____ #1 Bus _____ #2 Bus _____

Occupation: #1 _____ #2 _____

Church affiliation _____

Children (Note any "blended" or "special care" situations.)

Name _____ DOB _____ Marital status _____

Name _____ DOB _____ Marital status _____

Name _____ DOB _____ Marital status _____

Name _____ DOB _____ Marital status _____

ESTATE TRUSTEES (Executor/Executrix)

List names of possible, suitable trustees: _____

GUARDIANS (for minor children or mentally incapacitated dependents)

List names of possible, suitable guardians: _____

DISTRIBUTION OF ESTATE: All to surviving spouse: Yes No

If survived by children

equally to children per stirpes

% to children: _____

estate trustee(s) may use discretion to draw on capital and earnings for living expenses of children

TRUSTS for children: Once the children reach the age of majority, they should receive the balance of their inheritance: Immediately; or _____% at age _____; _____% at age _____; and _____% at age _____

% to charity or charities: _____

If there is no surviving spouse or children

% _____ to _____ % _____ to _____

% _____ to charity or charities

Distribution of personal/household effects (jewelry, art, books, clothes, furniture, etc.)

to be distributed among family at the discretion of the executor with priority given to the children (You may leave a separate letter of wishes for the executor.)

to be sold and proceeds added to the estate

Specific bequests: _____

PLANNING FOR INCAPACITY

Note: Since the terms used (power of attorney, representation agreement, personal representative, etc.) and powers granted differ from province to province, it is important that you know the regulations in your province before proceeding.

Property Issues (a separate document from your will)

List names that may be suitable, such as family or friends: _____

I wish these powers to be effective: immediately only if I am mentally incapacitated

Health and Personal Care Issues (a separate document from your will)

List names of people who may be suitable, such as family or friends: _____

NET WORTH

Date: _____

When considering how to divide your estate, it's important to understand the value of your estate, as well as the items that may need special attention. Completing this page will help AC consultants advise you. Please use round numbers (i.e. \$40,000 instead of \$42,137.68).

WHAT YOU OWN (ASSETS)

Property:

----- \$ -----

Business:

----- \$ -----

Bank Accounts:

----- \$ -----

RRSP/RRIF/Pension:

----- \$ -----

TFSA/Investments Accounts:

----- \$ -----

RESP/RDSP:

----- \$ -----

Life Insurance:

----- \$ -----

Other:

----- \$ -----

Total Assets

WHAT YOU OWE (LIABILITIES)

Mortgage/Loan:

----- \$ -----

Line of Credit/Credit Cards:

----- \$ -----

Other:

----- \$ -----

Total Liabilities

NET WORTH
