



PLANNING YOUR WILL WORKSHEET

Date Completed: _____

Family Information

#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 #1 _____ #2 _____

Telephone #1 _____ #2 _____

Occupation #1 _____ #2 _____

Children

Name _____ DOB _____ Marital Status _____

Name _____ DOB _____ Marital Status _____

Name _____ DOB _____ Marital Status _____

Name _____ DOB _____ Marital Status _____

Note any blended or special care situations for children listed

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/partner: Yes No _____

If survived by children

equally to children per stirpes

% to children: _____

charity via Abundance Canada: % of Estate _____ \$ Amount _____ Specific Asset _____

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 _____ ; _____ % at age _____ ; and _____ % at age _____

If no surviving spouse/partner or children

charity via Abundance Canada: % of Estate _____ \$ Amount _____ Specific Asset _____

Other names beneficiaries: % of Estate _____ \$ Amount _____ Specific Asset _____

Gift to Charity in Your Will Wording Options:

To Donate a Percentage of Estate

I hereby give, devise and bequeath _____ percent (_____ %) of the residue of my estate to Abundance Canada, CRA charitable registration number 12925 3308 RR0001.

EXAMPLE: I hereby give, devise and bequeath ten percent (10%) of the residue of my estate to Abundance Canada, CRA charitable registration number 12925 3308 RR0001.

To Donate a Specific Dollar Amount

I hereby give, devise and bequeath _____ and No/100 dollars (\$DOLLARS) to Abundance Canada, CRA charitable registration number 12925 3308 RR0001.

EXAMPLE: I hereby give, devise and bequeath one hundred thousand dollars (\$100,000.00) to Abundance Canada, CRA charitable registration number 12925 3308 RR0001.

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 Calculation

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. Please use round numbers (i.e. \$40,000 instead of \$42,137.68).

Indicate if assets are owned individually or jointly with spouse/partner or others.

Also indicate the beneficiary designations for applicable assets (Life Insurance, RRSP, RRIF, TFSA).

What You Own (Assets)

Property: _____
_____ \$ _____

Business: _____
_____ \$ _____

Bank Accounts: _____
_____ \$ _____

RRSP/RRIF/Pension: _____
_____ \$ _____

TFSA/Investment Accounts: _____
_____ \$ _____

RESP/RDSP: _____
_____ \$ _____

Life Insurance: _____
_____ \$ _____

Other: _____
_____ \$ _____

Total Assets: \$ _____

What You Owe (Liabilities)

Mortgages/Loans: _____
\$ _____

Lines of Credit/Credit Cards: _____
\$ _____

Other: _____
\$ _____

Total Liabilities: \$ _____

NET WORTH: \$ _____

Estimated taxes owing if you liquidated all your assets today: \$ _____



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