Intergenerational Planning Your Family Tree

RBC | **Wealth Management Dominion Securities**

Parent A	Parent B	Parent A	Parent B
First Name:	First Name:	First Name:	First Name:
City: YOB:	City: YOB:	City: YOB:	City: YOB:

Siblings	Client A	Client B	Siblings
First Name: YOB: Spouse: Beneficiary? City:	Full Name: POA(s): Date of Last Will: Your Executor/Trustee: Are you an Executor/Trustee:	Full Name: POA(s): Date of Last Will: Your Executor/Trustee: Are you an Executor/Trustee:	First Name: YOB: Spouse: Beneficiary? City:
First Name: YOB: Spouse: Beneficiary? City:			First Name: YOB: Spouse: Beneficiary? City:

Children

First Name: YOB: Spouse: Beneficiary? City:	First Name: YOB: Spouse: Beneficiary? City:		
First Name: YOB: Spouse: Beneficiary? City:	First Name: YOB: Spouse: Beneficiary? City:		

Siblings (left continued):
- First Name: YOB: Spouse: Beneficiary? City:
- First Name: YOB: Spouse: Beneficiary? City:

Siblings (right continued):
- First Name: YOB: Spouse: Beneficiary? City:
- First Name: YOB: Spouse: Beneficiary? City:

Nieces/Nephews	Grandchildren				Nieces/Nephews
First Name: YOB: Beneficiary?	First Name: YOB: Beneficiary?	First Name: YOB: Beneficiary?	First Name: YOB: Beneficiary?	First Name: YOB: Beneficiary?	First Name: YOB: Beneficiary?
First Name: YOB: Beneficiary?	First Name: YOB: Beneficiary?	First Name: YOB: Beneficiary?	First Name: YOB: Beneficiary?	First Name: YOB: Beneficiary?	First Name: YOB: Beneficiary?

Other Significant Friends/Family

				Nieces/Nephews
First Name: Relationship: City: YOB:	First Name: Relationship: City: YOB:	First Name: Relationship: City: YOB:	First Name: Relationship: City: YOB:	First Name: YOB: Beneficiary?