## Estate planning health-check questionnaire



Ce document est aussi disponible en français. This document is also available in French.

A comprehensive estate plan—including an up-to-date Will and powers of attorney<sup>1</sup>, appointing executors and attorneys suitable for the role—can help ensure your estate and loved ones are protected now and in the future. By conducting this health-check questionnaire, we can help identify the steps you should take and whether updates are required to help avoid potential problems now and down the road.

A legal document to deal with matters after your death       Its       No       No       No       No         1. Do you have a Will?       Image: Image	Will	Yes	No	I don't	N/A	
1. Do you have a will, is it up-to-date?       Image: a material change in your personal or asset situation?         b. Does the distribution in your will still reflect your current wishes and intentions?       Image: a material change in your personal or asset situation?         c. Do the executors you've named remain appropriate candidates for the role?       Image: a material change in your Will, and/or have you appointed a material change in your will, and/or have you appointed a material change in your will, and/or have you appointed a material change in your we want that gives are and how to reach them?       Image: a material change in your will, and/or have you appointed a material change in your we want at rust company to the role?       Image: a material change in your will, and/or have you appointed a material change in your we executors are and how to reach them?       Image: a material change in your we can and how to reach them?       Image: a material change in your we have you appointed a material change you we have an alternate we are and how to reach them?       Image: a material change your we have you appointed a material change your we have you we have an alternate we have you propriate candidates for the role?       Image: a material change you we have an alternate attorney appointed, and/or have you appointed a trust company material change you we have an alternate attorney appointed, and/or have you appointed a trust company material change your attorneys residents of Canada?       Image: a material change you we have an alternate attorney appointed, and/or have you appointed a trust company material change you we have an alternate attorney appointed, and/or have you appointed a trust company material change your attorney for property?       Image: a material change: a material change: a material change: a ma	A legal document to deal with matters after your death	ies	NO	know	N/A	
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5. Does your advisor know who your executors are and how to reach them?       Image: Controp of attorney         A legal document that gives someone else the authority to act on your behalf during your literime         1. Do you have powers of attorney for property/financial matters and your personal care?       Image: Controp of attorney         2. Are your powers of attorney up-to-date?       Image: Controp of attorney up-to-date?       Image: Controp of attorney up-to-date?         a. Do the attorneys you've named remain appropriate candidates for the role?       Image: Controp of Controp of Property?       Image: Controp of Controp of Property?         3. Do you have an alternate attorney appointed, and/or have you appointed a trust company as your attorney for property?       Image: Controp of						
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	1. Have you signed designation of beneficiary forms for the following:					
b. Insurance policies?	a. Registered accounts (e.g., RRSPs, RRIFs, TFSAs)?					
	b. Insurance policies?					
2. Are all designations compatible with the terms of your Will?	2. Are all designations compatible with the terms of your Will?					

If you answered "No" or "I don't know" to any of the questions above, a consultation with your advisor is strongly recommended to ensure your estate planning needs are in order. Together with your advisor, our RBC Royal Trust® professionals can work with you to create a customized estate plan.

<sup>1</sup> There are two basic types of powers of attorney: for your finances/property and for your personal care. Depending on the province/territory, a power of attorney for property, which remains effective during the grantor's or donor's incapacity, is referred to as continuing or enduring. In Quebec, it is referred to as a protection mandate. In British Columbia a representation agreement covers health and personal care decisions and can also cover routine financial and legal affairs.

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