

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 attorney¹, 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.

Will	Yes	No	I don't know	N/A
A legal document to deal with matters after your death				
1. Do you have a Will?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. If you do have a Will, is it up-to-date?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a. Have you experienced a material change in your personal or asset situation? For example, has your marital status changed or have you bought or sold a property?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Does the distribution in your Will still reflect your current wishes and intentions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Do the executors you've named remain appropriate candidates for the role?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have an alternate executor appointed in your Will, and/or have you appointed a trust company to the role?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Are all of your executors residents of Canada?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your advisor know who your executors are and how to reach them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Powers of attorney				
A legal document that gives someone else the authority to act on your behalf during your lifetime				
1. Do you have powers of attorney for property/financial matters and your personal care?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Are your powers of attorney up-to-date?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a. Do the attorneys you've named remain appropriate candidates for the role?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have an alternate attorney appointed, and/or have you appointed a trust company as your attorney for property?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Are all of your attorneys residents of Canada?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your advisor know who your attorneys are and how to reach them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beneficiary designation(s)				
A person(s) or charitable organization(s) that is entitled to receive the asset at the time of your death				
1. Have you signed designation of beneficiary forms for the following:				
a. Registered accounts (e.g., RRSPs, RRIFs, TFSAs)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Insurance policies?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Are all designations compatible with the terms of your Will?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

¹ 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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