

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 protection mandate, appointing liquidators and mandataries 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 foreseeing the disposition of your assets 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 liquidators 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 liquidator 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 liquidators residents of Canada?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your advisor know who your liquidators are and how to reach them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Protection mandate				
A legal document that gives someone else the authority to act on your behalf during your lifetime				
1. Do you have a protection mandate for property/financial matters and your personal care?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is your protection mandate up-to-date?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a. Do the mandataries 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 mandatory appointed in your protection mandate and/or have you appointed a trust company as your mandatory for property?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Are all of your mandataries residents of Canada?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your advisor know who your mandataries 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), where applicable?	<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.

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