

INSTRUCTIONS:

By answering the following questions, you will be well on your way to planning a Will which will help ensure that your wishes are respected when you die. The next step is to take this information to your professional advisor who can assist you in making a valid, comprehensive Will.

1. Who do you wish to be your executor?

You: _____

Your spouse: _____

2. Do you wish to appoint someone to assist your executor? Who? (co-executor)

You: _____

Your spouse: _____

3. Do you wish to name someone to replace your executor in the event of death? (contingent executor)

You: _____

Your spouse: _____

4. Do you wish to leave any personal property to anyone? (Bequest e.g., jewelry, collections, clothing)

You: _____

Your spouse: _____

5. Do you wish to leave a sum of money to anyone?

You: _____

Your spouse: _____

6. Do you wish to leave the remainder of your estate to your spouse?

You: Yes No

Your spouse: Yes No

7. If not, do you want to create a trust for your spouse, with the trust assets going to your children when your spouse dies?

You: Yes No

Your spouse: Yes No

8. Do you wish that any bequests to your children go directly to them or be held in trust by the executor?

You: _____

Your spouse: _____

9. Do you wish to have your business managed by trustees until your spouse and / or children are capable of doing so?

You: Yes No

Your spouse: Yes No

IN THE EVENT THAT CHILDREN ARE LEFT ALONE WHILE MINORS:

10. Who do you wish to name as guardian or guardians?

11. Do you wish your estate to be held in one trust until your youngest child reaches a certain age (usually age of majority) with income from the trust paid to children according to their individual needs? (sprinkler clause)

You: Yes No

Your spouse: Yes No

OR

Do you wish your estate to be divided equally on your death and held in separate trusts with income paid to each child from his or her own trust?

You: Yes No

Your spouse: Yes No

12. If, at any time because of inflation or special needs, the income is not sufficient, do you wish to allow the children to use part of their capital? (capital encroachment)

You: Yes No

Your spouse: Yes No

13. At what age should each child receive his or her share?
(date of final distribution e.g., age of majority, age 21, half at age 21 and remainder at age 25)

14. If a child dies before the date of final distribution and leaves children of their own alive, do you wish your grandchildren to take your child's share?

Yes No

15. If a child dies before the date of final distribution and leaves children of their own alive, do you wish that child's share to go to your other children still alive?

Yes No

16. If none of your children survive to the date of final distribution, to whom do you wish to leave the rest of your estate? (gift over)

You: _____

Your spouse: _____

17. Do you wish to leave money to a charity?

You: _____

Your spouse: _____

If yes, which charities?

You: _____

Your spouse: _____

OTHER PROVISIONS:

18. Are there any special clauses you want in your Will?

You: _____

Your spouse: _____

19. Are there any special funeral instructions? (e.g., cremation, closed casket, burial plot)

You: _____

Your spouse: _____

20. Has funeral/cremation been pre-arranged?

You: _____

Your spouse: _____

21. Do you have pets that require a care-giver?

Name of pet care-giver: _____

Have you made funds available to your pet care-giver? Yes No