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ESTATE PLANNING QUESTIONNAIRE

We recommend that you have an up-to-date Will, Power of Attorney, and Personal Directive. These advance planning documents can ensure that your wishes are followed and that there is a smooth transition from one generation to the next. This questionnaire provides your instructions for these documents, helps us identify potential legal issues, and confirms your wishes.

Will:

Your Will appoints your executors and allocates your property to your beneficiaries. Gifts can be specific items, or a general division of the value of your property. You can also identify guardians and trustees for minor children and grandchildren. Your Will comes into effect upon your passing. A professionally drafted will helps avoid confusion and unnecessary costs for your estate.

Enduring Power of Attorney:

Your Power of Attorney identifies the trusted friend or family member who would be allowed to manage your financial affairs, such as dealing with Revenue Canada, banking, managing investments, selling property, and employing accountants. Your Power of Attorney is in effect during your lifetime.

Personal Directives

Your Personal Directive identifies the trusted person you wish to manage your non-financial matters if you cannot manage them yourself. It deals with decisions such as healthcare, accommodation, end-of-life choices, etc. Your Personal Directive is in effect during your lifetime.

Fees

For an individual, the total cost for all three (3) documents would be approximately **\$485.00**.

For a couple, the total cost for all six (6) documents would be approximately **\$975.00**

One (1) document would be approximately **\$250.00**.

These estimates do not include disbursements or GST and additional costs may apply for unique clauses, revisions and additional work.

We require an initial retainer to open your file and those funds will be held in Trust by Properzi Tims as security for fees and disbursements. The retainer held in trust will be applied against your final account.

ESTATE PLANNING QUESTIONNAIRE

DATE			
SECTION 1 - FAMILY INFORMATION			
A. YOUR INFORMATION			
FULL LEGAL NAME			
ANY OTHER NAMES KNOWN BY			
ADDRESS			
PHONE NUMBER(S)			
E-MAIL ADDRESS			
DATE OF BIRTH			
PLACE OF BIRTH			
CITIZENSHIP			
DATE OF MARRIAGE			
PREVIOUS MARRIAGE			
B. YOUR SPOUSE'S INFORMATION (if applicable)			
FULL LEGAL NAME			
ANY OTHER NAMES KNOWN BY			
ADDRESS			
PHONE NUMBER(S)			
DATE OF BIRTH			
PLACE OF BIRTH			
CITIZENSHIP			
PREVIOUS MARRIAGE			
C. YOUR CHILDREN AND DEPENDENTS			
How many children do you have			
Are any of your children adopted, or step-children?	Yes	No	
If yes, which children?			
Have any of your children predeceased you?	Yes	No	
If yes, which children?			
Are any of your children or grandchildren disabled?	Yes	No	
If yes, who?			
Are you responsible for any other children?	Yes	No	
If yes, who?			
Are you responsible for any adult who is disabled?	Yes	No	
If yes, who?			
List your children with your current spouse, and their children (your grandchildren):			
CHILD'S FULL NAME	ADDRESS	AGE	MARITAL STATUS
1.			
Grandchildren- names & ages:			
2.			

Grandchildren- names & ages:			
3.			
Grandchildren- names & ages:			
4.			
Grandchildren- names & ages:			
5.			
Grandchildren- names & ages:			

List your children from any prior relationship, and their children

CHILD'S FULL NAME	ADDRESS	AGE	MARITAL STATUS
6.			
Grandchildren- names & ages:			
7.			
Grandchildren- names & ages:			
8.			
Grandchildren- names & ages:			

D. YOUR PROPERTY

		If yes:
Do you own your home?	Yes No	Legal description: Approx value:
Do you own any farm land?	Yes No	Legal description: Approx value:
Do you own any other real property?	Yes No	Legal description:

		Approx value:
Have you an interest in mines and minerals?	Yes No	Legal description: Approx value:
Do you own any property jointly with someone not your spouse?	Yes No	Legal description: Approx value:
Do you have life insurance?	Yes No	Beneficiary:
Do you have a pension?	Yes No	Beneficiary:
Do you have RRSPs or investments?	Yes No	Beneficiary:
Do you own assets outside Alberta?	Yes No	Where:
Do you own any shares in a private corporation?	Yes No	Name of Corporation(s)
Do you own assets outside Canada?	Yes No	Where:
Do you have an interest/benefit in someone else's estate or a trust?	Yes No	Whose:
Does anyone owe you money?	Yes No	How much?
Do you own a life insurance policy on the life of another person?	Yes No	
Do you have a safety deposit box?	Yes No	Where?

**SUMMARY OF ASSETS & LIABILITIES
(or attach recent net worth statement)**

ASSETS	Est. Value:	DEBTS	Est. Value
All real estate:		All Mortgages	
All bank accounts:		All Lines of Credit	
All RRSPs, pensions & investments:		All other bank loans	
Life insurance benefits:		Vehicle loans	
Private corporations:		All other debts	
Other:			
TOTAL ASSETS		TOTAL LIABILITIES	

SECTION 2 – INSTRUCTIONS FOR YOUR WILL			
DO YOU HAVE A WILL NOW?			
WHY DO YOU NEED A NEW WILL?			
A. EXECUTORS (“Personal Representative”)			
<p><i>Your executor, often your spouse, is responsible for looking after and distributing your property after you die . You need to name an alternate in case your first choice is unavailable when the time comes.</i></p> <p><i>It is important choose an executor who lives in Canada, and preferably Alberta.</i></p> <p><i>It is preferable but not essential that the Executors have been asked and are willing to act.</i></p>			
1. Your Executor(s) (usually spouse, if applicable)			
FULL NAME	RELATIONSHIP TO YOU	ADDRESS	AGE
2. Your Alternate Executor(s)			
1. Spouse’s Executor(s) (if applicable)			
FULL NAME	RELATIONSHIP	ADDRESS	AGE
2. Spouse’s Alternate Executor(s)			
B. GUARDIANS FOR MINOR CHILDREN (under 18)			
<p><i>A surviving parent will almost always be the guardian of your children.</i></p> <p><i>If both parents pass away, it is important that another guardian has been named, plus an alternate in case your first choice is unavailable when the time comes.</i></p> <p><i>It is preferable but not essential that the guardians have been asked and are willing to act.</i></p>			
First choice of Guardian			
FULL NAME	RELATIONSHIP	ADDRESS	AGE
Alternate Guardian			
FULL NAME	RELATIONSHIP	ADDRESS	AGE

C. ESTATE DISTRIBUTION TO BENEFICIARIES				
<p><i>Your beneficiaries are the people who will inherit your property.</i> Primary distribution is your first choice of beneficiaries - usually your spouse (if applicable) if they survive you. Secondary distribution is who inherits your property if your first choice has died before you. Special gifts or legacies are specific high value gifts you want to leave to specific people, such as land, money, or valuables.</p>				
PRIMARY DISTRIBUTION				
Everything to your spouse?		Yes	No	
If no, then who is to inherit?				
FULL NAME	ADDRESS:			
FULL NAME	ADDRESS:			
SECONDARY DISTRIBUTION: if your spouse or first choice of beneficiary dies before you, then:				
Everything to your children and step children equally?		Yes	No	
If no, then equally to your children only?		Yes	No	
If no, then who is to inherit?				
FULL NAME	ADDRESS:			
FULL NAME	ADDRESS:			
Special gifts and legacies (list property, items, or amounts)				
FULL NAME	GIFT:			
FULL NAME	GIFT:			
If a child dies before you or doesn't reach the age of inheritance, then that person's share is to:				
Go equally to his or her children (your grandchildren)?		Yes	No	
If no, or he/she has no children, then equally to your surviving children?		Yes	No	
If no, then who is to inherit?				
FULL NAME	ADDRESS:			
FULL NAME	ADDRESS:			
Age of Inheritance				
<p><i>The age of majority is 18 in Alberta. You can specify if you want children to receive their inheritance at 18 or older. You may also specify that a percentage of the inheritance is to be given at different ages.</i></p>				
Minors inherit at:	18	21	25	Other:
Family demise				
If you, your spouse, children and grandchildren die in a common accident, who is to inherit?				
½ to my parents and ½ to my spouse's parents		Yes	No	
½ to my siblings and ½ to my spouse's siblings		Yes	No	
To my spouse's and my nephews & nieces equally		Yes	No	
To charity? If so which ones:		Yes	No	

D. DISPOSITION OF REMAINS			
What would you like to happen to your remains? Please circle one			
Please circle one:	Burial	Cremation	Other:
Do you have plans for the following?			
Location of Plot			
Pre-arranged Funeral	Yes	No	Who with?

SECTION 3 – INSTRUCTIONS FOR YOUR ENDURING POWER OF ATTORNEY (EPA)			
DO YOU HAVE AN EPA NOW?			
WHY DO YOU NEED A NEW EPA?			
A. ATTORNEY(S)			
<p><i>Your attorney can look after your financial affairs and legal matters while you are alive.</i></p> <p><i>You can name one person alone, two people to act together or one person with an alternate. Joint attorneys can only act together. Joint and several attorneys can act together or separately.</i></p> <p><i>You should ask your attorney if they are willing to act for you in this way.</i></p>			
Your Attorney (usually spouse)			
FULL NAME	RELATIONSHIP	ADDRESS	AGE
Your Alternate Attorney			
FULL NAME	RELATIONSHIP	ADDRESS	AGE
Spouse's Attorney (usually spouse)			
FULL NAME	RELATIONSHIP	ADDRESS	AGE
Spouse's Alternate Attorney			
FULL NAME	RELATIONSHIP	ADDRESS	AGE
B. SPRINGING or IMMEDIATE			
<p>An immediate EPA comes into effective right away and continues even if you lose mental capacity.</p> <p>A springing power of attorney comes into effective only if you are declared unable to make decisions.</p>			
Would you like an immediate Enduring Power of Attorney?		Yes	No
C. RESTRICTIONS			
<p>A general EPA allows your attorney to act on all financial matters, including taxes, land, gifts, professional services etc. A specific EPA only allows your attorney to act of particular matters.</p>			
Are there any restrictions you want to put on your attorney?		Yes	No
If yes, what restrictions?			

SECTION 4 – INSTRUCTIONS FOR PERSONAL DIRECTIVE (PD)

DO YOU HAVE A PD NOW?	
WHY DO YOU NEED A NEW PD?	

A. AGENT(S)

Your agent can look after your health affairs , including health care, accommodation and activities, while you are alive, if you are unable to take your own decisions.

You can name one person alone, two people to act together or one person with an alternate. Joint agents can only act together. Joint and several agents can act together or separately.

You should ask your agent if they are willing to act for you in this way.

Your Agent (usually spouse)

FULL NAME	RELATIONSHIP	ADDRESS	AGE

Your Alternate Agent

Spouse’s Agent (usually spouse)

FULL NAME	RELATIONSHIP	ADDRESS	AGE

Spouse’s Alternate Agent (usually spouse)

B. DECISIONS

In cooperation with your physicians, your agent will usually decide when you are no longer able to make your own decisions. A general PD allows your agent to make decisions about all health matters, including accommodation, end of life care, etc.

Is there someone else you want to be involved in decisions?	Yes	No
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If yes, who?	
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Is anyone else to be notified when your PD comes into effect?	Yes	No
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If yes, who?	
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Are there any restrictions you want to put on your agent?	Yes	No
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If yes, what restrictions?	
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