YOUR ESTATE DIRECTORY

Family Information

Name:	
Address:	
Date of Birth & Place:	
Occupation:	
Employer or self-employed:	
Annual Income:	
Home Number	Business Number:
Email:	
If Married	
Spouse's Name:	
Date of Birth and Place:	
Where were you married:	Other:
Marriage or Domestic Contact:	Provide copy:
Contract For a Domicile:	
Does your spouse have a will?:	Yes No

Previous marriage by either spouse If so, which spouse

Provide copies of your Judgment for Divorce, Separation Agreement, etc.	
Date and Place of Divorce:	
Name of Previous Spouse:	
Children of Previous Marriage (if disabled, indicate nature of disability)	
Name:	Birth Date:
Name:	Birth Date:
Name:	Birth Date:
Dependents	
Name:	Birth Date:
Name:	Birth Date:
Name:	Birth Date:
Name:	Birth Date:
Other dependents (eg. parent, brother, etc.)	
Name:	Birth Date:
Name:	Birth Date:
Name:	Birth Date:
Name:	Birth Date:

ESTATE DIRECTORY QUESTIONNAIRE

Are you presently receiving benefits from an estate or trust?	Yes/No

If so, please provide the particulars	
Have you set up a trust to benefit another person? If so, attach a copy	
Are you an executor or trustee of any estate? Provide details.	
Do you have an	
Accountant	Name:
	Address:
	Phone:
Life Insurance Agent	Name:
	Address:
	Phone:
Financial Advisor	Name:
	Address:
	Phone:
Lawyer	Name:
	Address:
	Phone:
Trustee	Name:
	Address:
	Phone:

Assets, Liabilities & Net Worth

Assets

Property in the name of:	
Value:	
Mortgage Amount:	
Outstanding:	
Net Balance:	

Personal assets of spouse or joint ownership, (furniture, car, etc.) Value

Item	Value	Joint or spouse ownership

List any other Properties (in whose name, date of purchase, address, value, mortgage)

Name	Purchase date	Address	Value	Mortgage

Investments (stocks, bonds, GICs, etc.)

Company Name	Account #	Shares	Value	Contact Details

List any other Interests in Private Companies, Shareholders Agreement or Buy/Sell Agreements

Small Business/Sole Proprietorship	
Name & Type of company and the details:	

Pension Plan - Note - Is Beneficiary to take if spouse's statutory right is elected?

Beneficiary Designation Company	Account No.	Contact info.
RRSP:		
CPP:		

Liabilities

Company	Account No.	Amount	Contact Info.

Mortgage			

Your Home

Is this the Matrimonial Home	
Do you have Mortgage Insurance:	Policy Holder:
Policy No.	
Insurance Company:	

Insurance Summary

Type	Company	Policy No.	Contact Info.	Beneficiary
Life				

Banking Information & Safety Deposit Boxes

Bank Name	Address	Account #	In The Name Of

Other Assets

Name of Asset	Apx. Value	Location	Contact Info.

If you have a Will;

It's Location	Last Updated?	Lawyer's Info	Executor's Name

Are any taxes resulting from death to be paid from capital without recourse to beneficiaries?

What powers does the executor have?

Pension Plan - Note - Is Beneficiary to take if spouse's statutory right is elected?

Funeral Instructions:

Do you have either of the following Powers of Attorney prepared?

Continuing Power of Attorney for Property:
Power of Attorney for Personal Care:
Where are they located and make sure that they are up to date:

Any other Special Instructions: