

Date:

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Personal Information - Client

Name:				
Address:				
Telephone:	Residence:	Business:	Cellular:	Facsimile:
Age:	Birth Date:	Birth Place:		
Marital Status:		Date:	Place:	
Marriage/Separation Agreement:		Particulars:		

Spouse Information

Name:			
Telephone:	Cellular:	Business:	Facsimile:
Age:	Birth Date:	Birth Place:	

Information - Children

Name:		
Age:	Birth Date:	Birth Place:
Address:		
Name:		
Age:	Birth Date:	Birth Place:
Address:		
Name:		
Age:	Birth Date:	Birth Place:
Address:		
Name:		
Age:	Birth Date:	Birth Place:
Address:		

Mentally/Physically Challenged or Otherwise Dependent

Name:		
Age:	Birth Date:	Birth Place:
Address:		
Name:		
Age:	Birth Date:	Birth Place:
Address:		

Other Intended Beneficiaries

Name:		
Age:	Birth Date (if minor):	Relationship:
Address:		
Name:		
Age:	Birth Date (if minor):	Relationship:
Address:		
Name:		
Age:	Birth Date (if minor):	Relationship:
Address:		
Name:		
Age:	Birth Date (if minor):	Relationship:
Address:		

Executors

Name:	Relationship:
Address:	
Name:	Relationship:
Address:	
Name:	Relationship:
Address:	

Trustees (if different from Executors)

Name:	Relationship:
Address:	
Name:	Relationship:
Address:	

Guardians for Infants

Name:	Relationship:
Address:	
Name:	Relationship:
Address:	

Cash

Safe Deposit Box:	Location:	
Bank/Credit Union:	Location:	Ownership:
Bank/Credit Union:	Location:	Ownership:
Bank/Credit Union:	Location:	Ownership:
Bank/Credit Union:	Location:	Ownership:

Life Insurance

Company:	Policy #:	Value:	Beneficiary:
Company:	Policy #:	Value:	Beneficiary:
Company:	Policy #:	Value:	Beneficiary:
Company:	Policy #:	Value:	Beneficiary:

Real Estate

Legal Description:	Value:
Legal Description:	Value:
Legal Description:	Value:
Legal Description:	Value:
Legal Description:	Value:

Personal/Household

Description:	Value:
Description:	Value:
Description:	Value:
Description:	Value:
Description:	Value:
Automobile:	Value:
Automobile:	Value:
Automobile:	Value:
Boats:	Value:
Interest in other Estates:	Value:

Business/Farm/Partnership

Description:	Value:
Machinery & Equipment:	Value:
Grain on Hand:	Value:
Cattle:	Value:

RRSPs/RRIFs/Pensions/Annuities

Company:	Contract #:	Value:	Beneficiary:
Company:	Contract #:	Value:	Beneficiary:
Company:	Contract #:	Value:	Beneficiary:
Company:	Contract #:	Value:	Beneficiary:

Other Investments

Bonds:	#:	Value:	Location:
Bonds:	#:	Value:	Location:
Stocks:	#:	Value:	Location:
Stocks:	#:	Value:	Location:
Stocks:	#:	Value:	Location:

Liabilities

Land Mortgage Co.:	Property Covered:	Balance:
Land Mortgage Co.:	Property Covered:	Balance:
Chattel Mtg. Co.:	Property Covered:	Balance:
Chattel Mtg. Co.:	Property Covered:	Balance:
Leases:		
Indemnities:		
Guarantees:		
Separation Agr.:		
Maintenance:		

General Information

Do you/spouse have a will?
Accountant Name/Address:
Investment Broker/Address:
Life Insurance Agent/Address:
Beneficiary under any trust?
Have you set up any trusts?
Party to corporate buy/sell agreement?
Any assets outside SK?

Will Provisions - Specific Bequests

As directed or may agree
Household/personal effects/jewelry
Automobiles
Real Estate
Cottage
Farmland
Other

Will Provisions - Charitable Gifts

Name/Address
Name/Address
Name/Address

Will Provisions - Trusts

Spouse
Children
Mentally/Physically Challenged

Will Provisions - Residue

Souse:	Particulars
Children:	Particulars

Will Provisions - General

Insurance Policy Beneficiary Designations	
RRSP Beneficiary Designations	
Powers of Personal Representatives	
Matrimonial Property	
Forgiveness of Debts	
Funeral?	Particulars
Remains	Particulars

Power of Attorney

Attorneys	Particulars
Guardians	Particulars
Health Care Proxy Name:	Relationship:
Address:	
Health Care Proxy Name:	Relationship:
Address:	
Heroic Measures?	Other Instructions