

# WILLS CHECKLIST

I want to make sure that all your wishes are considered and all your assets are properly transferred.

So before you come to see me for our first meeting, make sure you have all the information and reports that you need.

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## Wills Checklist:

### PEOPLE

- Names, addresses and contact information for:
  - Yourself and your spouse
  - Your children
  - Your dependents
  - Person(s) you wish to name as your estate trustee(s) (executor(s))
  - Financial planners, investment advisers, accountants, life insurance agents

### ASSETS

- Model, make and value of automobiles and boats
- List of antiques, artwork, jewellery of significant value
- Real estate - Deed/Transfer confirming your ownership, address, original cost, approximate current fair market value
- Bank accounts - Information about each bank account (bank address, account number, ownership of account, approximate balance)
- Life insurance - Information about each policy of life insurance (name of company, policy number, type of plan, named beneficiary)
- RRSPs, RIFs, pensions and annuities - Information about each account (name of company, contract number, type of plan, named beneficiary)

- RESPs, RDSPs - Information about each account (name of company, contract number, type of plan, named beneficiary)
- Investments – Information about all stocks and/or bonds, their original costs, estimated market values and names of registered owners. Property in other jurisdictions (details)
- Owned businesses - Incorporation documents, corporate minute book, shareholder or partnership agreements

### LIABILITIES

- Mortgages – amount owing, names of mortgagees, are they insured?
- Other debts – amount owing, names of creditors

### THINK ABOUT

- Who to name as estate trustee (executor) of your will
- Disposition of residence/cottage
- Disposition of RRSPs, RIFs, annuities, pensions
- Disposition of RESPs, RDSPs
- Disposition of residue
- Who to name as your power of attorney for property/personal car