



Will Questionnaire for Client Completion

Date: \_\_\_\_\_

Please fill out the below information, which will be discussed in further detail at your appointment, and return to our office using one of the below methods:

- 1. Email to info@chinneck.ca
2. Fax to 519-432-4811
3. Deliver to our office (37 Ridout Street South, London)

1. Personal Information

Full Legal Name: \_\_\_\_\_

The name you commonly use, if different than above: \_\_\_\_\_

Citizenship: \_\_\_\_\_

Home Address: \_\_\_\_\_

Telephone: (H) \_\_\_\_\_ (C) \_\_\_\_\_ (W) \_\_\_\_\_

Email: \_\_\_\_\_

2. Family Information

Marital Status: [ ] Single [ ] Married [ ] Separated [ ] Divorced [ ] Widowed
[ ] Common Law [ ] Engaged

Do you have any support obligations? [ ] Yes [ ] No

Please bring to your appointment any domestic contracts (separation agreement, cohabitation agreement, marriage contract/prenuptial agreement)

Children (both alive and deceased):

Name: Date of Birth:
\_\_\_\_\_
\_\_\_\_\_
\_\_\_\_\_
\_\_\_\_\_
\_\_\_\_\_

### 3. Asset Information

#### A. Real Estate

Address/Legal description (if known)	Estimated Fair Market Value	Mortgage Balance (if any)	Type of ownership (sole owner, joint tenants, tenants in common)

#### B. Bank Accounts

Institution and Account Number	Balance (Estimate)	Solely Owned? Yes/No	Jointly owned? Yes/No If yes, please list name of person who shares this account

#### C. Registered Retirement Savings Plan (RRSP), Registered Retirement Income Fund (RRIF), Tax-Free Savings Account (TFSA)

Institution and Account Number	Balance (Estimate)	Beneficiaries

#### D. Registered Education Savings Plan (RESP)

Institution and Account Number	Balance (Estimate)	Subscribers	Beneficiaries

**E. GICs, Stocks, Bonds, Mutual Funds, Investment Accounts**

<b>Institution and Account Number</b>	<b>Balance (Estimate)</b>	<b>Solely Owned? Yes/No</b>	<b>Jointly owned? Yes/No If yes, please list name of person who shares this account</b>

**F. Life Insurance**

<b>Institution, Policy Number, Type</b>	<b>Owner</b>	<b>Insured</b>	<b>Beneficiary</b>	<b>Death Benefit Value</b>

**G. Pension Plans**

<b>Institution</b>	<b>Beneficiary</b>	<b>Death Benefit? Yes/No</b>

**H. Business Interests**

<b>Name and Address</b>	<b>Ownership Structure (sole proprietor, Partnership, Corporation)</b>	<b>Fair Market Value</b>	<b>Shareholders Agreement? Yes/No</b>	<b>Percent Interest</b>

**I. Intellectual Property (trademarks, patents, copyright)**

Please provide details.

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**J. Foreign Assets**

Description	Country	Estimated Value	Solely Owned? If no, list joint owners

**K. Personal Property of significant value (household furnishings, vehicles, boats, jewellery, artwork, antiques, firearms, etc)**

Description	Appraised or Estimated Value

**L. Loans Receivable**

Does anyone owe you money? Please provide details.

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**M. Liabilities**

Please provide amounts owing for credit cards, line of credit, student debts, vehicle/furniture/appliance payments, etc.

Institution/Creditor	Amount Owing (Estimate)	Solely Owned? If no, list persons who share liability	Insured? Yes/No

**N. Other Assets**

Future Inheritance – Who?:

Safety Deposit Box – Location:

- Genetic Material (ie. reproductive material, cord blood)
- Trust Interests?
- Power of Appointment (power to dispose of certain property at own discretion under another's Will)

Digital Assets:

- Computers       Tablets       Storage devices       Mobile telephone/smartphones
- Email Accounts       Digital Photographs/videos       Social Network Accounts
- File Sharing Accounts       Financial Accounts       Website Domain Registrations
- Other:

#### 4. Considerations

Please consider the following prior to your appointment:

1. Executors: the person(s) who will administer your estate.
  - a. We recommend appointing a primary and alternate
2. Pets: do you want to appoint someone to look after your pets?
  - a. Do you want to give a specific person discretion to re-home your pets?
  - b. Do you want to give a cash gift to anyone who cares for your pets?
3. Disposition of your estate: how your estate will be distributed.
  - a. Legacies/Bequests: Do you want to gift any cash sums or specific items?
  - b. Residue: Who will inherit from your estate? (ie. spouse first, then children – at what age to inherit?)
  - c. Common Disaster: Who will inherit in the unlikely event that all your beneficiaries predecease you? (ie. siblings, parents, charities)
4. Guardians for Minors: who will look after your children if you pass away before they attain the age of 18?
  - a. We recommend appointing a primary and alternate
5. Power of Attorney for Property: who do you wish to manage your property (ie. financial affairs) should you become incapable of making those decisions yourself?
  - a. We recommend appointing a primary and alternate
6. Power of Attorney for Personal Care: who do you wish to appoint to make personal care decisions for you should you become incapable of making those decisions for yourself?
  - a. We recommend appointing a primary and alternate