



Personal Information

- **Full Legal Name:** \_\_\_\_\_
- **Date of Birth:** \_\_\_\_\_
- **Place of Birth:** \_\_\_\_\_
- **Address:** \_\_\_\_\_
- **Phone Number:** \_\_\_\_\_
- **Email Address:** \_\_\_\_\_

Family Information

- **Spouse/Partner's Name:** \_\_\_\_\_
- **Children's Names and Ages:**
  - Child 1: \_\_\_\_\_
  - Child 2: \_\_\_\_\_
  - Child 3: \_\_\_\_\_
  - (Add more if necessary)

Executor Information

- **Executor's Name:** \_\_\_\_\_
- **Executor's Contact Information:** \_\_\_\_\_
- **Alternate Executor's Name:** \_\_\_\_\_
- **Alternate Executor's Contact Information:**  
\_\_\_\_\_

Beneficiaries

- **Primary Beneficiaries:**
  - Name: \_\_\_\_\_
  - Relationship: \_\_\_\_\_
  - Specific Bequest (if any): \_\_\_\_\_
  
  - Name: \_\_\_\_\_
  - Relationship: \_\_\_\_\_
  - Specific Bequest (if any): \_\_\_\_\_

WILL PREPARATION QUESTIONNAIRE



- Name: \_\_\_\_\_
- Relationship: \_\_\_\_\_
- Specific Bequest (if any): \_\_\_\_\_
  
- Name: \_\_\_\_\_
- Relationship: \_\_\_\_\_
- Specific Bequest (if any): \_\_\_\_\_

• **Alternate Beneficiaries** (if primary beneficiaries predecease you):

- Name: \_\_\_\_\_
- Relationship: \_\_\_\_\_
  
- Name: \_\_\_\_\_
- Relationship: \_\_\_\_\_
  
- Name: \_\_\_\_\_
- Relationship: \_\_\_\_\_
  
- Name: \_\_\_\_\_
- Relationship: \_\_\_\_\_

Special Bequests (Specific personal possessions or amounts of money you wish to leave to individuals or organizations (e.g., jewelry, artwork, or family heirlooms).)

- **Item/Asset:** \_\_\_\_\_
  - Recipient's Name: \_\_\_\_\_
  - Relationship: \_\_\_\_\_
  - Description of Bequest: \_\_\_\_\_
  
- **Item/Asset:** \_\_\_\_\_
  - Recipient's Name: \_\_\_\_\_
  - Relationship: \_\_\_\_\_
  - Description of Bequest: \_\_\_\_\_



- **Item/Asset:** \_\_\_\_\_
  - Recipient's Name: \_\_\_\_\_
  - Relationship: \_\_\_\_\_
  - Description of Bequest: \_\_\_\_\_
  
- **Item/Asset:** \_\_\_\_\_
  - Recipient's Name: \_\_\_\_\_
  - Relationship: \_\_\_\_\_
  - Description of Bequest: \_\_\_\_\_
  
- **Item/Asset:** \_\_\_\_\_
  - Recipient's Name: \_\_\_\_\_
  - Relationship: \_\_\_\_\_
  - Description of Bequest: \_\_\_\_\_

Guardianship (for minor children)

- **Guardian's Name:** \_\_\_\_\_
- **Guardian's Contact Information:** \_\_\_\_\_
- **Alternate Guardian's Name:** \_\_\_\_\_
- **Alternate Guardian's Contact Information:**  
\_\_\_\_\_

Asset Information

Real Estate

- **Property 1:**
  - Address: \_\_\_\_\_
  - Ownership Details: \_\_\_\_\_
  
- **Property 2:**
  - Address: \_\_\_\_\_
  - Ownership Details: \_\_\_\_\_

Companies

- **Company 1:**
  - Name: \_\_\_\_\_



- Ownership Percentage: \_\_\_\_\_
- **Company 2:**
  - Name: \_\_\_\_\_
  - Ownership Percentage: \_\_\_\_\_

Out-of-Country Assets

- **Asset 1:**
  - Description: \_\_\_\_\_
  - Location: \_\_\_\_\_
- **Asset 2:**
  - Description: \_\_\_\_\_
  - Location: \_\_\_\_\_

Insurance Policies

- **Policy 1:**
  - Provider: \_\_\_\_\_
  - Policy Number: \_\_\_\_\_
  - Beneficiary: \_\_\_\_\_
- **Policy 2:**
  - Provider: \_\_\_\_\_
  - Policy Number: \_\_\_\_\_
  - Beneficiary: \_\_\_\_\_

RRSPs (Registered Retirement Savings Plans)

- **RRSP 1:**
  - Institution: \_\_\_\_\_
  - Account Number: \_\_\_\_\_
  - Beneficiary: \_\_\_\_\_
- **RRSP 2:**
  - Institution: \_\_\_\_\_
  - Account Number: \_\_\_\_\_

WILL PREPARATION QUESTIONNAIRE



- Beneficiary: \_\_\_\_\_

Debts and Liabilities

- **Creditor's Name:** \_\_\_\_\_
- **Amount Owed:** \_\_\_\_\_
  
- **Creditor's Name:** \_\_\_\_\_
- **Amount Owed:** \_\_\_\_\_
  
- **Creditor's Name:** \_\_\_\_\_
- **Amount Owed:** \_\_\_\_\_
  
- **Creditor's Name:** \_\_\_\_\_
- **Amount Owed:** \_\_\_\_\_
  
- **Creditor's Name:** \_\_\_\_\_
- **Amount Owed:** \_\_\_\_\_

Special Instructions

- **Funeral Arrangements:** \_\_\_\_\_
- **Charitable Donations:** \_\_\_\_\_
- **Other Instructions:** \_\_\_\_\_

Additional Information

- **Location of Important Documents:**  
\_\_\_\_\_
- **Wills Notice Filed:** Yes / No
- **Date of Wills Notice:**

This information sheet is intended to help your lawyer understand your wishes and the necessary details to draft a comprehensive will that reflects your intentions. Please ensure all information is accurate and up-to-date.