



QUESTIONNAIRE FOR WILL

Name: _____

Address: _____

Telephone: _____ Occupation: _____

Married: Yes No Common Law: Yes No Name: _____

If married or common law, are assets jointly owned? Yes No _____

If not owned jointly, what is ownership? _____

Children: Yes No Names (include ages if under 18) _____

Executor (s): _____ Resident(s) of: _____

Alternate Executor: _____ Resident of: _____

Alternate Executor: _____ Resident of: _____

Specific Bequests: _____

Beneficiary(ies) (include size of share (%) if applicable): _____

Alternate Beneficiary(ies) (include size (%) of share): _____

If any beneficiaries are children, how old must they be to receive their entitlement? _____

Any beneficiary receiving government disability pension? _____

If the alternate beneficiaries are the testator's children, are there second alternate beneficiaries who would receive under the Will in the case of a common family disaster? _____

NOTES
